mcis

MCIS Project Deliverer User Guide

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Introduction

How to use this guide

This user guide is designed to support you following your MCIS training. The guide is broken down into clear sections so that you can pick out the functionality that you are interested in re-visiting, revising or reminding yourself of. The user guide can be used in conjunction with the online help within the MCIS system.

About Project Deliverers

The Project Deliverer role allows an Intermediate Body user to effectively manage the projects they are responsible for. As a Project Deliverer you can:

- Set up new projects.
- Make live new projects.
- Amend contractual and non-contractual project details on the system.
- Review a project.
- Set project risk rating.
- Modify a project's outputs once a claim has been paid.
- Set the status of a clawback to unrecovered or no longer required where appropriate*.
- Close a project.

Project Deliverer Team Leaders

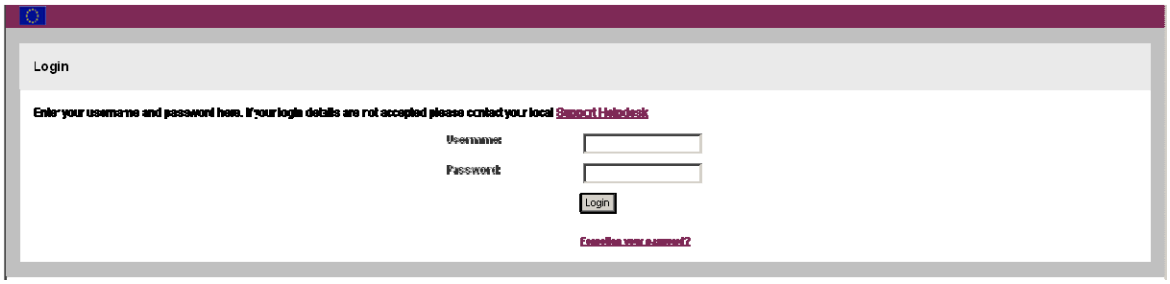
A Project Deliverer allocated a 'Team leader' status on MCIS can, in addition to the tasks above:

- Assign a project to a Project Deliverer (i.e. allocate an owner for a project)
- Access a project assigned or 'locked' under another Project Deliverer and route it to him or herself, or another Project Deliverer.

Logging in and out of MCIS

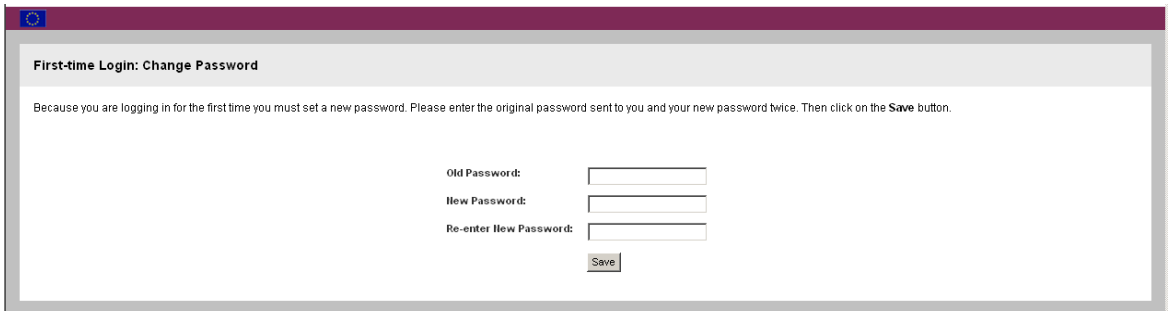
Login

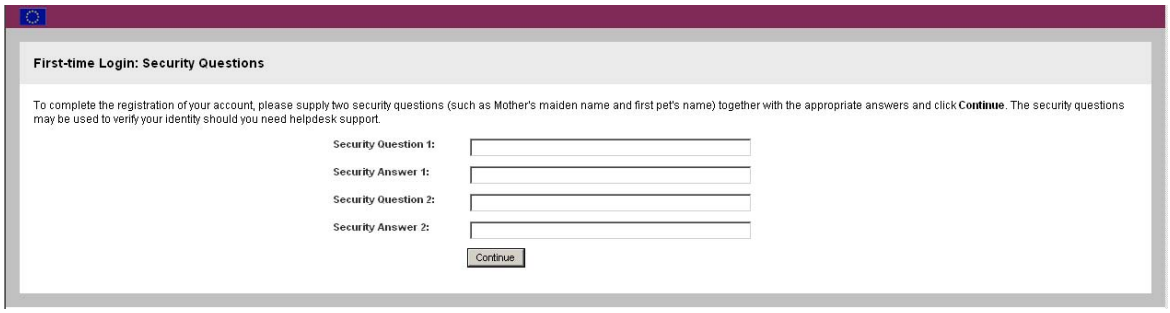
To log in to MCIS, go to the home page of the ERDF for England website - www.erdf.communities.gov.uk - and click on 'login'.


Login
Enter your username and password here. If your login details are not accepted please contact your local Support Helpdesk
Username:
Password:
Login

1. Enter your Government Gateway Username and password. Click on Login.
2. The first time you log-in as a new user, for security purposes you will be asked to change your password. You are also required to add two security questions and answers. These will be used to validate your identity should forget your password in the future.

Security at first log-in


First-time Login: Change Password
Because you are logging in for the first time you must set a new password. Please enter the original password sent to you and your new password twice. Then click on the Save button.
Old Password:
New Password:
Re-enter New Password:
Save

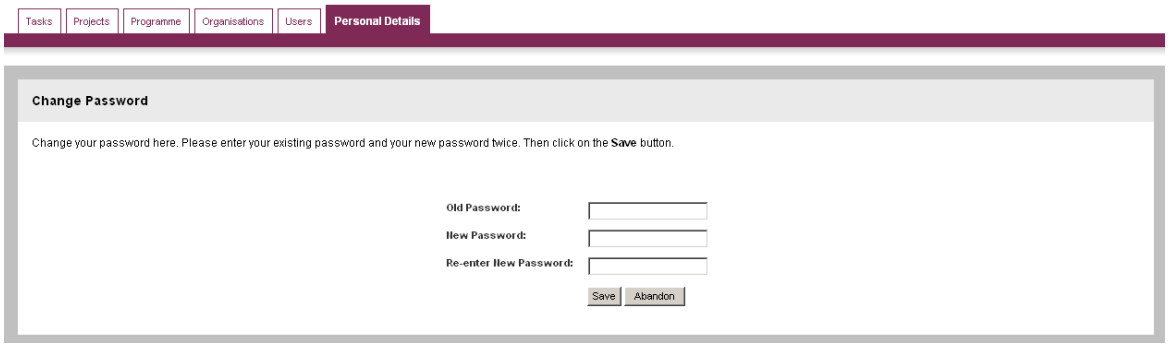

First-time Login: Security Questions
To complete the registration of your account, please supply two security questions (such as Mother's maiden name and first pet's name) together with the appropriate answers and click Continue. The security questions may be used to verify your identity should you need helpdesk support.
Security Question 1:
Security Answer 1:
Security Question 2:
Security Answer 2:
Continue

3. On subsequent log-ins, your Personal Page will display.

Notes:

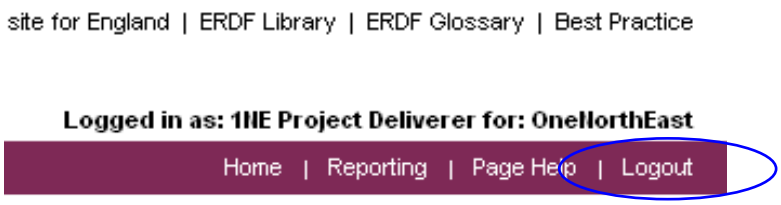
- Once you are logged-in, MCIS will not generally request further proof of your identity. It is therefore essential that you do not share your ID and password with anyone.
- If you have not received a MCIS ID and password prior to go-live contact your Intermediate Body MCIS helpdesk.
- If you forget, or want to change, your password click on the Personal Details tab, and select 'Change Password'.

Change password screen



Logout

Click on the Logout link in the top right navigation bar.


site for England | ERDF Library | ERDF Glossary | Best Practice
Logged in as: 1NE Project Deliverer for: OneNorthEast
Home | Reporting | Page Help | Logout

Home: Tasks

To display this screen

'Tasks' is always the first page that displays after you log in to MCIS. To return to this page at any time during your MCIS session click on the 'Home' link in the top right navigation bar.

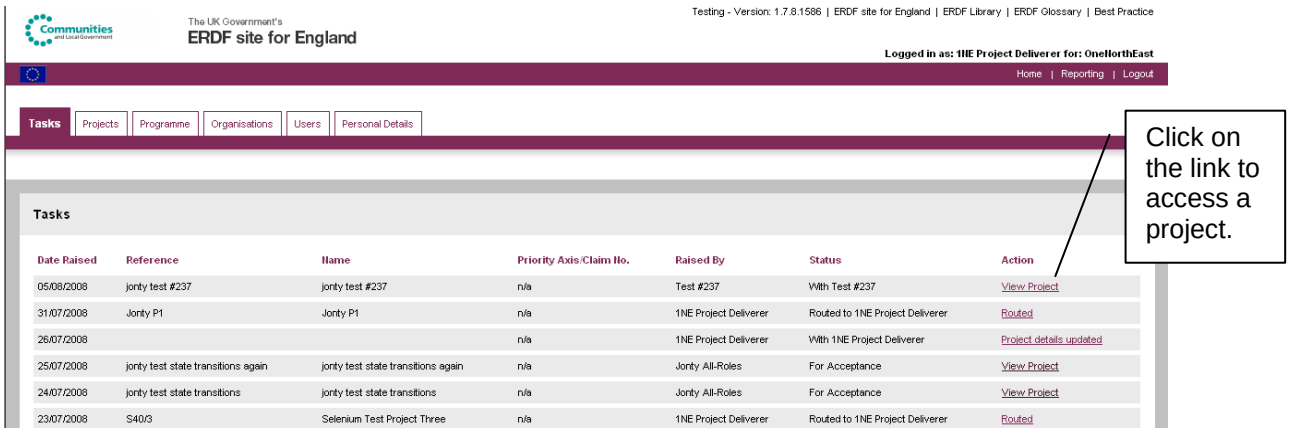
About this screen

The 'Tasks' page is your main 'hub' on MCIS. Your Task List displays all tasks relevant to the role or roles that you have been allocated. For the purpose of this guide we will focus only on tasks relevant to the Project Deliverer.

Tasks can be either open or locked:

Task Status	Description
Open	Anyone with the appropriate MCIS role can take up and complete. These tasks will display with a status of 'For acceptance'. To pick up an open task click on the link in the Action column.
Locked	Only the named user can take up and complete. The status will contain the name of the user who currently owns the task. If a task is routed to a new user then the status will display as 'Routed to x', where x is the user's name, until the user accepts the task.

For the Project Deliverer, the Task list shows all projects that require action and those which are currently being worked on. Where the project is being worked on by another Project Deliverer, this will be indicated in the Status column.

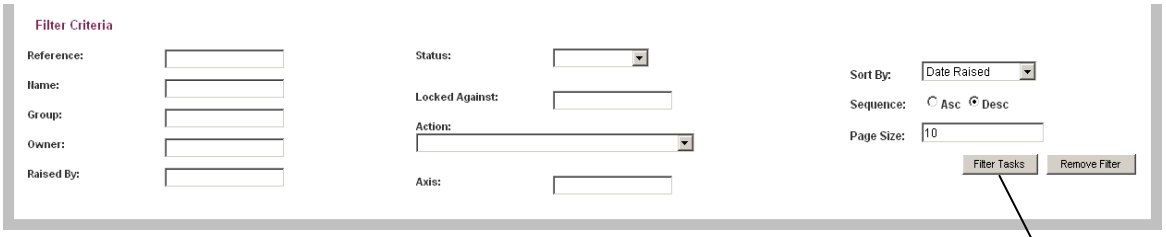

Testing - Version: 1.7.8.1586 | ERDF site for England | ERDF Library | ERDF Glossary | Best Practice
The UK Government's
ERDF site for England
Logged in as: 1NE Project Deliverer for: OneNorthEast
Home | Reporting | Logout
Tasks
Projects
Programme
Organisations
Users
Personal Details
Tasks
Date Raised
Reference
Name
Priority Axis/Claim No.
Raised By
Status
Action
05/08/2008 jonty test #237 jonty test #237 n/a Test #237 With Test #237 View Project
31/07/2008 Jonty P1 Jonty P1 n/a 1NE Project Deliverer Routed to 1NE Project Deliverer Routed
26/07/2008 n/a 1NE Project Deliverer With 1NE Project Deliverer Project details updated
25/07/2008 jonty test state transitions again jonty test state transitions again n/a Jonty All-Roles For Acceptance View Project
24/07/2008 jonty test state transitions jonty test state transitions n/a Jonty All-Roles For Acceptance View Project
23/07/2008 S40/3 Selenium Test Project Three n/a 1NE Project Deliverer Routed to 1NE Project Deliverer Routed
Click on the link to access a project.

Filtering

A range of filter criteria are provided to help you prioritise your Task List.

1. To filter tasks, enter as many or as few criteria as you require and click on the **Filter Tasks** button.

2. To remove all selections and display all tasks, click on the **Remove Filter** button.



Filter Tasks button

Explanations of the filter fields are displayed on the next page.

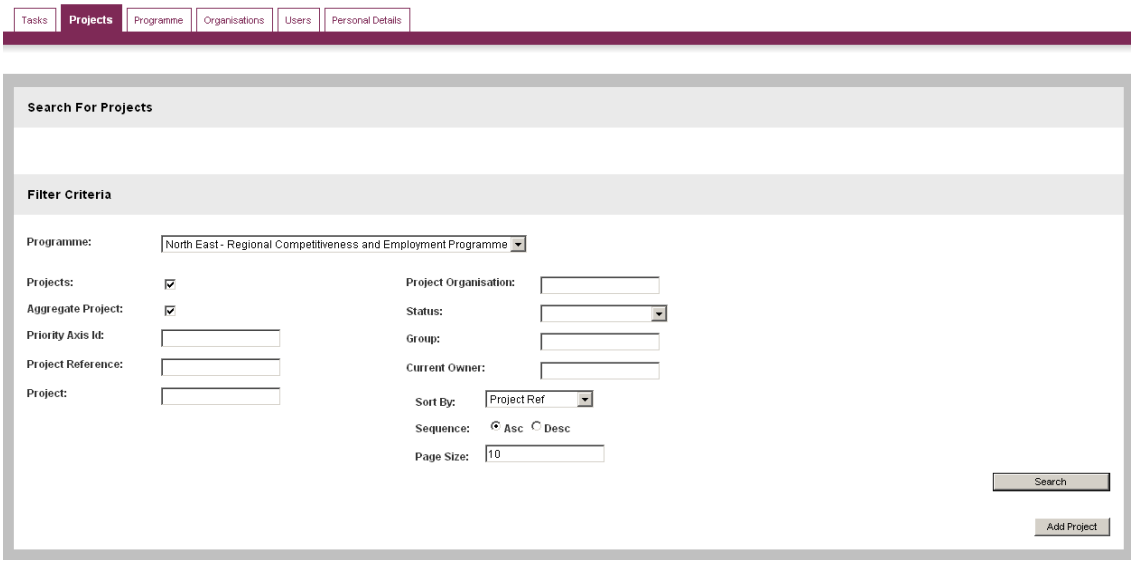
Field	Description
Reference	Enter the project reference to display only tasks relating to that project.
Name	Enter the project name to display only tasks relating to that project.
Group	Groups are categories set up by the Intermediate Body at programme level for workflow and reporting purposes. Groups may be, for example, thematic - e.g. urban regeneration - or geographic - e.g. sub-regions. Enter a group name to display only tasks associated with projects belonging to that group.
Owner	Each project on MCIS is 'owned' by a Project Deliverer within the Intermediate Body. To filter tasks by an owner enter their name here. This can be your own, or another user's name.
Raised By	If you wish only to view tasks raised by a specific person on MCIS, enter their name here.
Status	Click in this field to display different task statuses by which you can then filter your list.
Locked Against	If you wish only to view tasks locked against a specific person on MCIS, enter their name here. This may be you, or another user.
Action	Click in the field to display a list of actions – for example 'Accept amendment' - which you can then select from and filter by.
Axis	Enter a Priority Axis number to display only tasks relating to that Priority Axis.
Sort By	Click in the field to display and select from a list of options to sort your tasks. You may sort by any of the Task List column headings. The default setting is 'Date Raised'.
Sequence	Results will display in descending order. If you wish to view results in an ascending order, click the 'Asc' radio button.
Page Size	Click in this field and enter the number of results you would like to appear on each page. The default setting is 10.

Projects Search

To display this screen

1. From your home (Tasks) page click on the Projects tab.

2. The screen below displays.



About this screen

This screen allows you to search for project(s) held on MCIS. Intermediate Body users can search for all projects in the programme(s) of which they are associated with. The default in MCIS is that Intermediate Body users are associated to all projects within their Programme, to have this edited contact your Intermediate Body User Administrator. Applicant users can search only for projects associated with their organisation.

A range of criteria can be applied to your search, as detailed in the table below.

Note: MCIS allows you to use a 'wildcard' search: e.g., if you want to find all projects which start with A, type A* in the Project Name field. Wildcards can be used in any alphanumeric field.

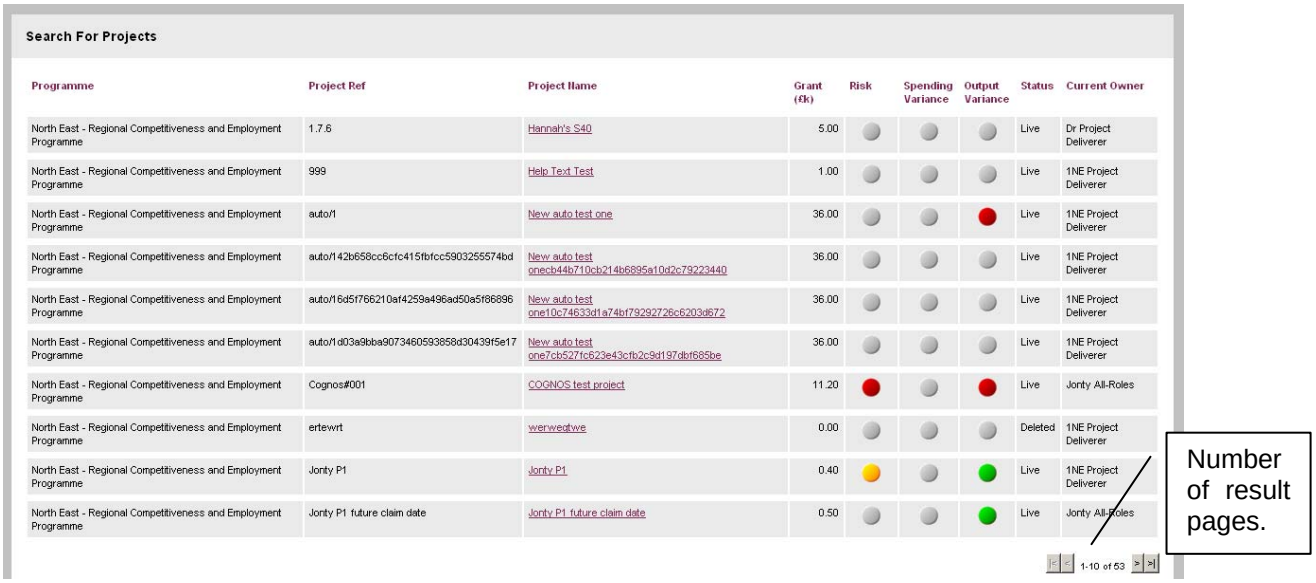
Search Criteria

Field	Description
Programme	To perform a search, you must first select the correct programme. Click in the field to display a list of programmes in your region and select the appropriate one.
Priority Axis ID	To search against a specific Priority Axis, enter the Priority Axis numbers in this field.
Project Reference	Each project has a unique reference code assigned to it by the Intermediate Body. Enter this reference here to search for a single project.
Project Name	Enter the project name to search for a single project.
Project Organisation	Enter an applicant name to display all projects associated with that organisation.
Status	Click in this field to display a list of different statuses. Select one to show all projects, that you are permitted to view, with that status.
Project Group	Project Groups are categories set up by the Intermediate Body at programme level for workflow and reporting purposes. Intermediate Body users may enter a group name to display all projects in the programme allocated to that group.
Current Owner	Intermediate Body users may enter the name of the current owner of the project to search for all projects that person is responsible for.
Sort By	Click in the field to display and select from a list of sort options to determine how your search results will display. The default setting is the Project Reference.
Sequence	Results will display in an ascending order. If you wish to view results in a descending order, click the 'Desc' radio button.
Page Size	Click in this field and enter the number of results you would like to appear on each page. The default setting is 10.

1. Enter your search criteria.
2. Click on the **Search** button.

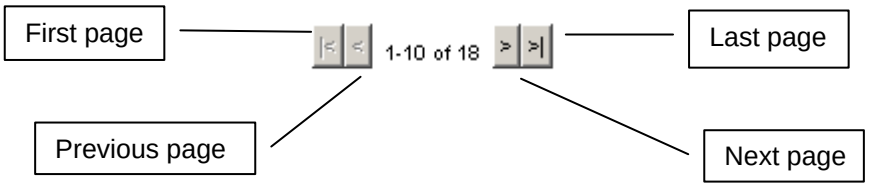
Search Results

1. Search results display on the same screen, below the search fields. Scroll down to view results.



2. If your search returns over 10 items, they will display across more than one page. The number of results pages is displayed in the bottom right hand corner as highlighted above.

3. On subsequent pages, the first page and previous page buttons become available.

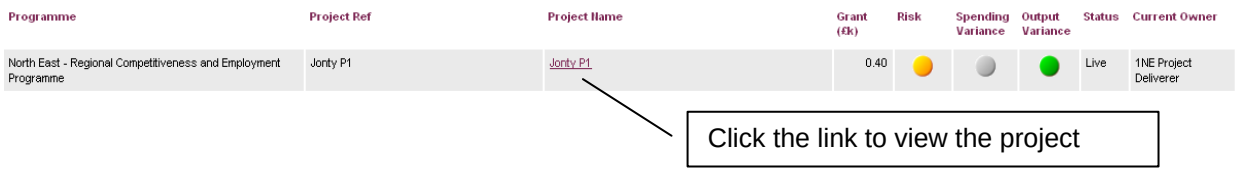


Search Results: Column Descriptions

Column	Description
Programme	The regional programme that this project is under - i.e. 'Regional Competitiveness and Employment Programme' or 'Convergence Programme'.
Project Ref.	The project reference number is generated outside of MCIS by the Intermediate Body.
Project Name	The project name as it appears on the funding agreement.
Grant (£k)	This figure represents the total ERDF grant committed.
Risk	Indicates the overall risk rating allocated to the project. Project Deliverers should provide an initial risk assessment and then evaluate the ongoing 'risk' for each of their projects. Red – requires attention Amber – marginal Green – acceptable/on target Until a risk rating has been entered on MCIS the symbol will show in grey.
Spending Variance	This reflects the achievement of actual against contracted expenditure (capital and/or revenue). This status is automatically updated by MCIS. Red – requires attention (+/- 25%) Amber – marginal (+/- 10%) Green – acceptable/on target.
Output Variance	This reflects the performance against the targets that the project has been contracted to deliver. This status is automatically updated by MCIS. Red – requires attention (+/- 25%) Amber – marginal (+/- 10%) Green – acceptable/on target.
Status	This indicates the current status of a project e.g. 'Live', 'Draft', 'Deleted'.

Column	Description
Current Owner	Displays the name of the current 'owner' of the project. This relates to the project status. For example, if the project is 'live' the current owner will be the responsible Project Deliverer; if the project is 'pending approval' the owner will be a user with the Grant Approver role.

4. Click on the relevant **Project Name** link to open the project.



5. The project opens on the Project Profile Overview screen. Please see page 55 of this user guide for more information.

If your search returns no results, the following message will display:

6. Check your search criteria, amend if necessary and search again.

Set up a new project

Only users assigned the Project Deliverer role are permitted to set up new projects on MCIS.

1. On the Projects screen, scroll down to reveal the **Add Project** button.
2. Click the

button.
3. The Offer Details screen 'Project and Applicant Details' will display.

The sections which follow explain how to complete all necessary information for the creation of a new project and how the offer approval and acceptance process works on MCIS.

History

To display this screen

Click on the Next Step button in the Comments screen or the History link in the Steps navigation pane.

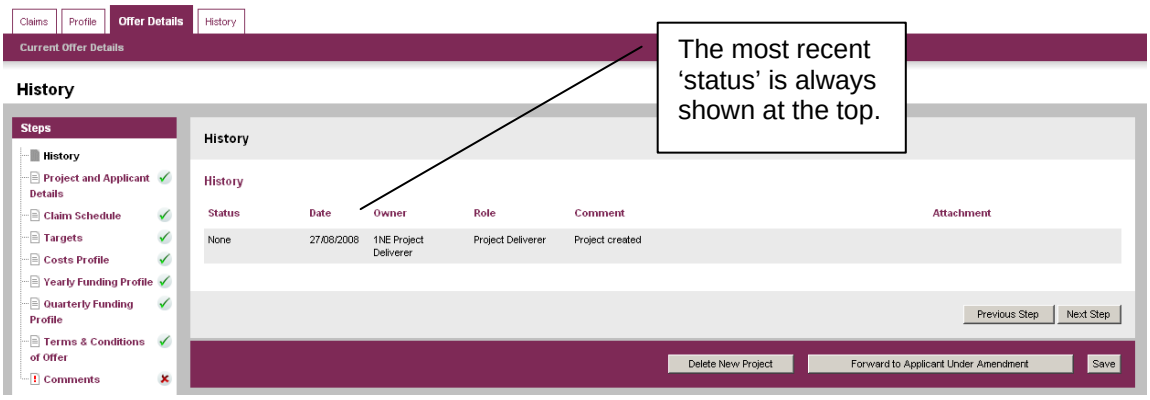
About this screen

The History page is an information only page. It acts as a record of all the processes the project goes through for the duration of the project. It clearly states when and by whom changes have been made, thereby providing a clear audit trail.

If attachments have been added by a user on the Comments screen, they can be accessed here, by any user within the Regional Programme, if they are 'associated' with that project.

New Projects

With a new project, the project has not been passed from one state to another yet, therefore a status of 'none' displays. A comment of 'project created', added by MCIS, also shows here, together with the date the project was added to MCIS and your name and role.



As the project progresses through the workflow, this history will reflect the changes, and will grow. The most recent status will always display at the top of the list.

Project and Applicant Details

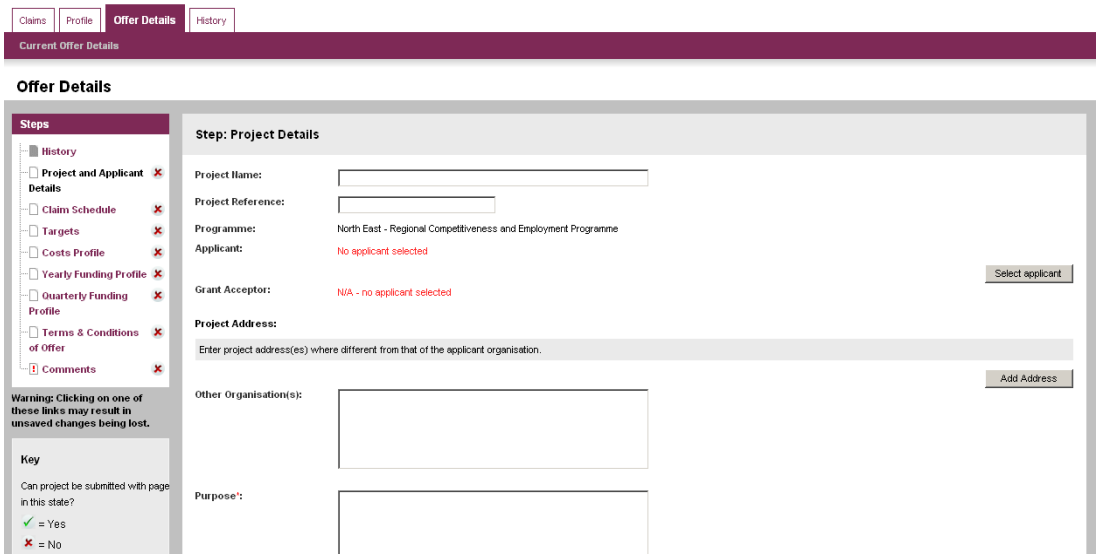
To display this screen

From the 'History' screen, click on the **Next Step** button, or click the 'Project and Applicant Details' link in the Steps navigation pane. This screen will automatically appear first when 'New Project' is clicked on the Project Search page.

About this screen

This screen captures details of the project and Applicant organisation.

Much of the information requested on this screen is mandatory and must be completed.



Completing this screen

1. Enter a name for the project.

2. Enter the project reference -this is generated by each Intermediate Body at a local level, outside MCIS.

3. The regional Programme will be automatically populated by MCIS.

4. To select the applicant organisation and the name of the Grant Acceptor click 'Select applicant'. The following process is described in more detail on page 19.

5. Click ‘Add Address’ to add addresses associated with the project that differs to that of the applicant organisation address. The following process is described in more detail on pages 21-22.

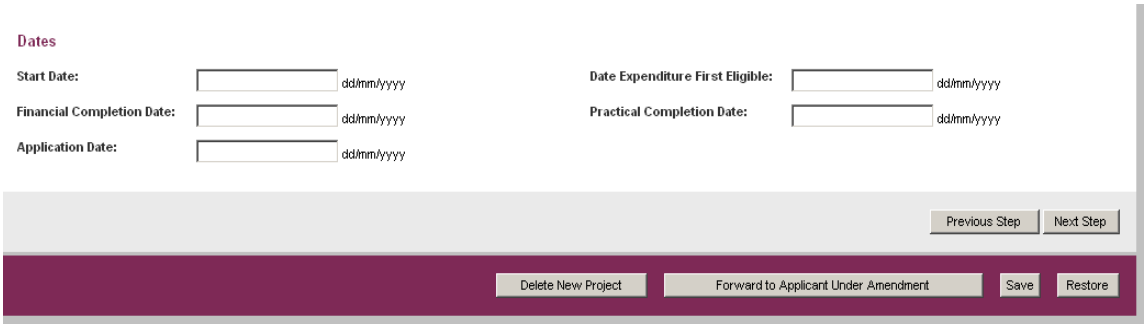
6. If necessary, click into the Other Organisation(s) field and enter the relevant details of any additional organisations involved in the project.

7. Click into the Project Purpose field and enter a description of the purpose of the project. This is a mandatory field.

8. Select the appropriate Priority axes associated with the project by clicking in the tick box.

Note: At least one Priority Axis must be selected for the project. Once a project has been made live and claims have been made against it, a Priority Axis cannot be deleted; however, additional Priority Axis can be added.

9. Scroll down and enter the key dates for the project.



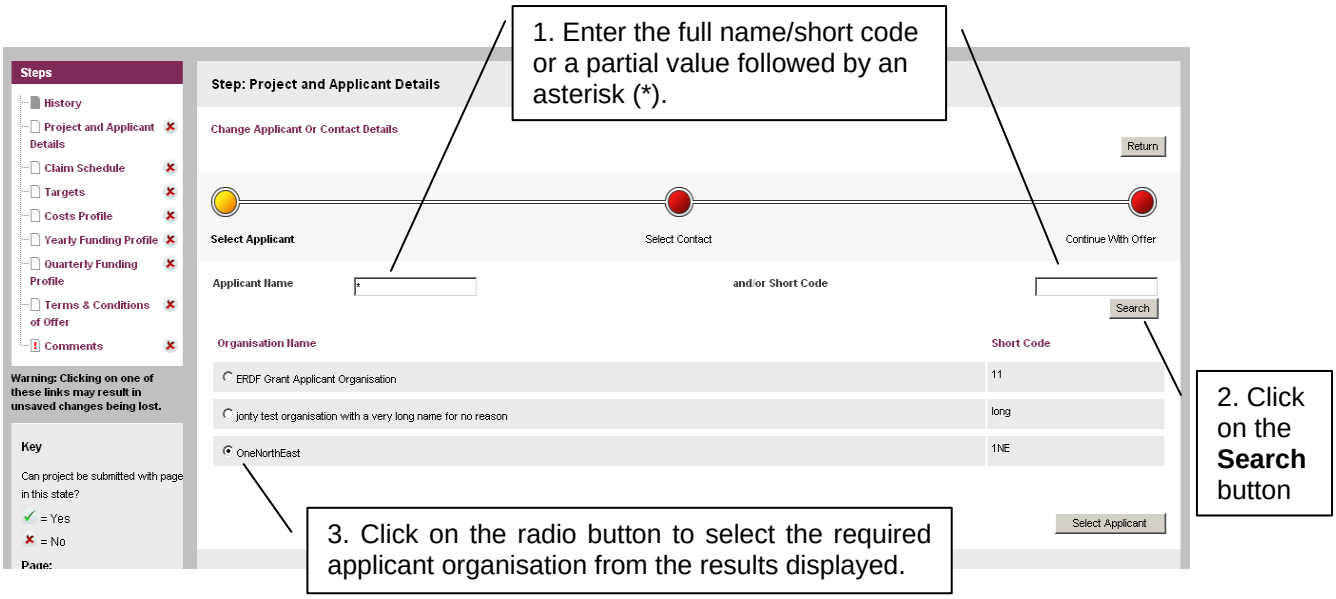
Explanations of these dates are found on the next page.

Field	Description
Start Date	The date the project is scheduled to start and claims/progress reports are required for project monitoring.
Financial Completion Date	The date by which all expenditure eligible for grant, including any retention expenditure, must be paid. It must be less than, or equal to the practical completion date.
Date Expenditure First Eligible	The date which expenditure is first eligible for grant. No expenditure can be added before this date. This date can be before or after the project start.
Practical Completion Date	The date on which the project is planned to have achieved all its targets. It must be more than or equal to the financial completion date.
Application Date	The date on which the application for grant was submitted to the Intermediate Body for appraisal.

Select Applicant

To display this screen

Click on the **Select Applicant** button on the Project and Applicant Details screen. The screen below displays.

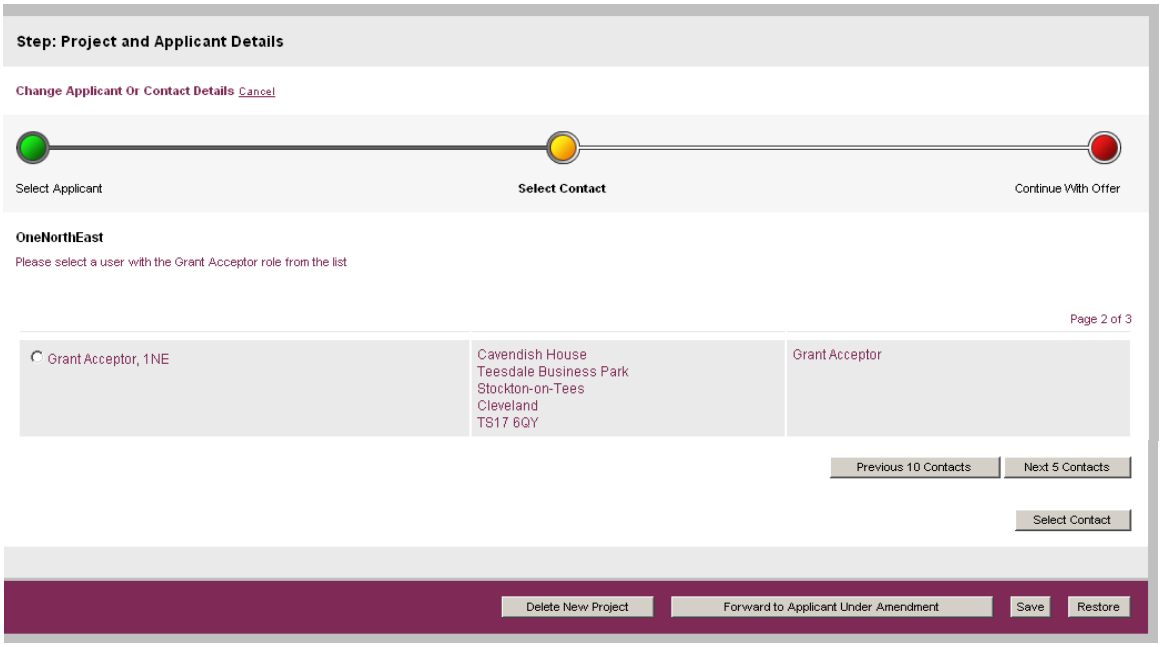


1. Enter the Applicant name or short code

2. Click on the Search button.

Note: If the Applicant organisation does not display on the first search results page, click on the Next *X* Organisations button.

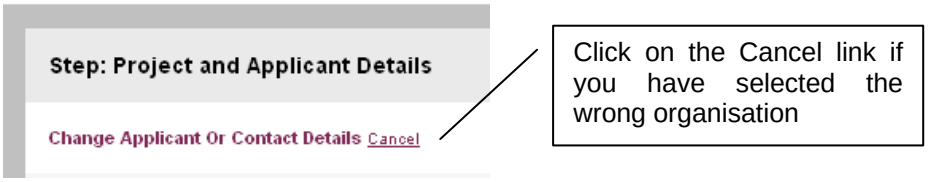
3. Click on the radio button beside the Applicant Organisation and click on the **Select Applicant** button.



4. A list of registered MCIS users should display in the lower half of the screen. Select the radio button against the correct contact name, and click on the Select Contact button. The user must have the Grant Acceptor user role.

Note: If the Applicant or user's name is not in MCIS, you will need to contact your User Administrator and provide him/her with the necessary details to add the organisation and/or user to the system before you can proceed.

Note: If you make an error and select the wrong organisation or contact, scroll back to the top of the page and click on the **Cancel** link. You will be returned to the main Project and Applicant Details screen. Click the Select Applicant button and repeat the above steps.

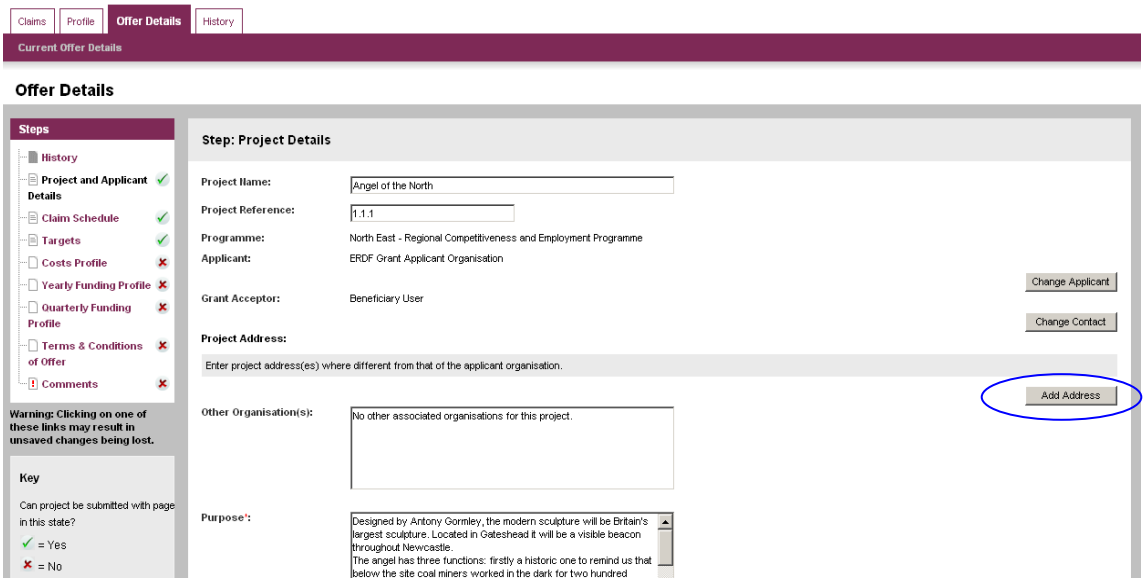

Step: Project and Applicant Details
Change Applicant Or Contact Details Cancel
Click on the Cancel link if you have selected the wrong organisation

Note: From the Project and Applicant Details screen, if you need to amend the organisation, click on the **Change Applicant** button. To change the contact, click on the **Change Contact** button. The same series of pages will display.

Add New Applicant Address

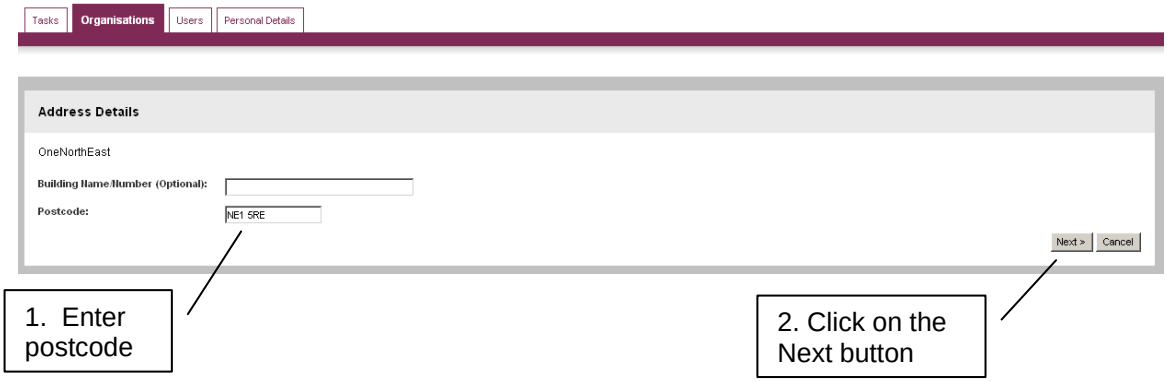
To display this screen

On the Project and Applicant Details screen, click on the **Add New Address** button.


Claims
Profile
Offer Details
History
Current Offer Details
Offer Details
Steps
History
Project and Applicant Details
Claim Schedule
Targets
Costs Profile
Yearly Funding Profile
Quarterly Funding Profile
Terms & Conditions of Offer
Comments
Warning: Clicking on one of these links may result in unsaved changes being lost.
Key
Can project be submitted with page in this state?
= Yes
= No
Step: Project Details
Project Name:
Angel of the North
Project Reference:
1.1.1
Programme:
North East - Regional Competitiveness and Employment Programme
Applicant:
ERDF Grant Applicant Organisation
Change Applicant
Grant Acceptor:
Beneficiary User
Change Contact
Project Address:
Enter project address(es) where different from that of the applicant organisation.
Add Address
Other Organisation(s):
No other associated organisations for this project.
Purpose*:
Designed by Antony Gormley, the modern sculpture will be Britain's largest sculpture. Located in Gateshead it will be a visible beacon throughout Newcastle.
The angel has three functions: firstly a historic one to remind us that below the site coal miners worked in the dark for two hundred

About this screen

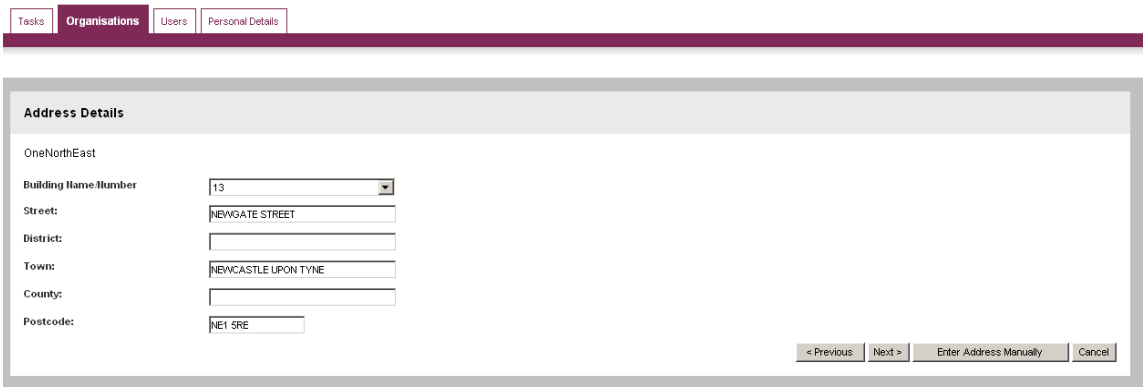
Use this screen to add a new address for an applicant.



Completing this screen

1. Enter the postcode for the new applicant address.

2. Click on the **Next** button. Details of the address display.



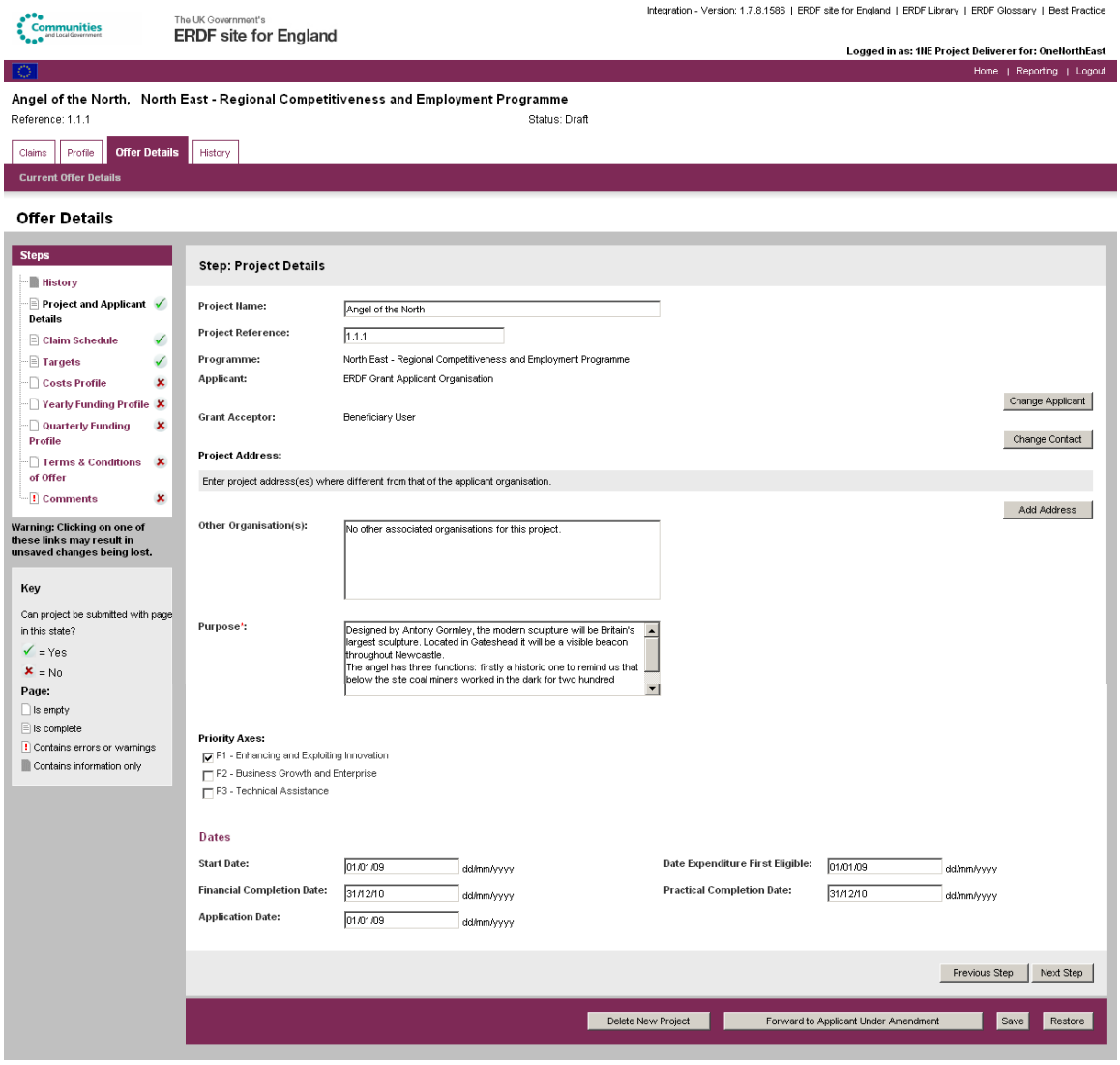
3. There may be multiple building names/numbers that fit the postcode. If the one displayed is incorrect click in the drop-down box to display all possible options and select the appropriate one.

4. When the details are correct, click on the **Next** button. The Project and Applicant details screen will redisplay.

5. If the details displayed are incorrect, either click on the **Previous** button to check the postcode entry and try again, or click on the **Enter Address Manually** button and enter the required details.

Note: If you make an error at any time, click on the Cancel button. The Project and Applicant details screen will redisplay.

Completed Project and Applicant Details screen:



6. To save and complete the Project and Applicant Details section of the project set-up, click Next Step. The Claim Schedule page will be displayed.

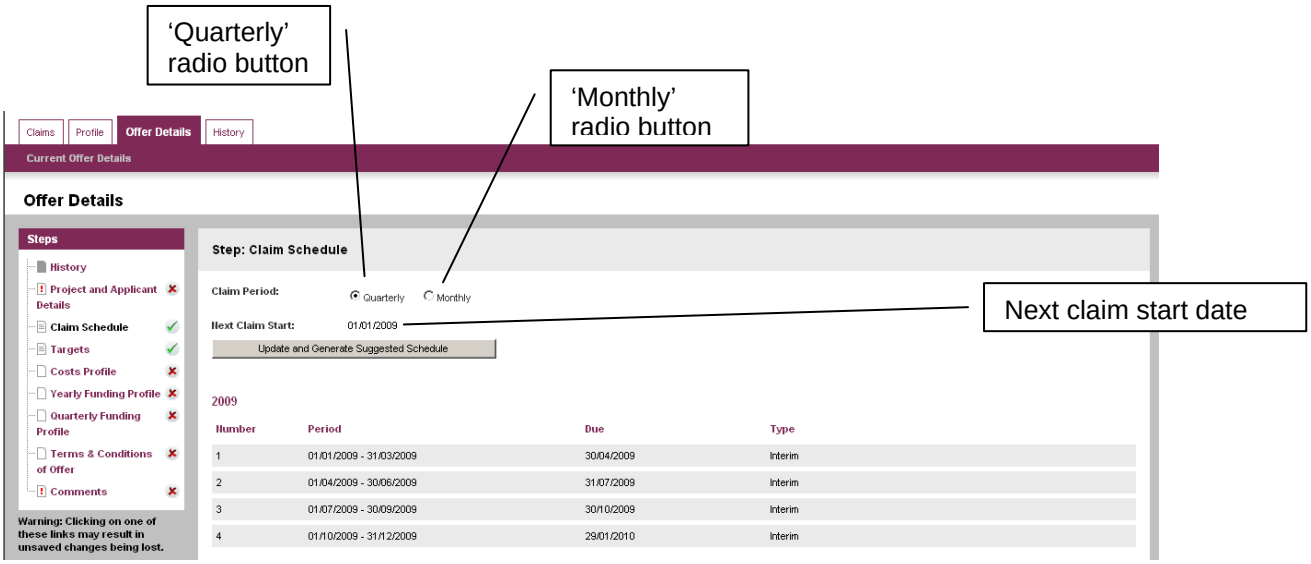
Claim Schedule

To display this screen

From the 'Project and Applicant Details' screen, click on the **Next Step** button, or click the 'Claim Schedule' link in the Steps navigation pane.

About this screen

This screen is used for setting up the claim schedule for the project. MCIS supports calendar quarter or monthly claims. The default setting is a quarterly claiming period but this may be changed. The date on which the next claim will start is also displayed.



Completing this screen

1. MCIS will automatically generate a quarterly claim schedule.

2. To create a monthly claim schedule, click on the Monthly radio button.

3. Click the **Update and Generate Suggested Schedule** button. A monthly schedule displays.

Targets

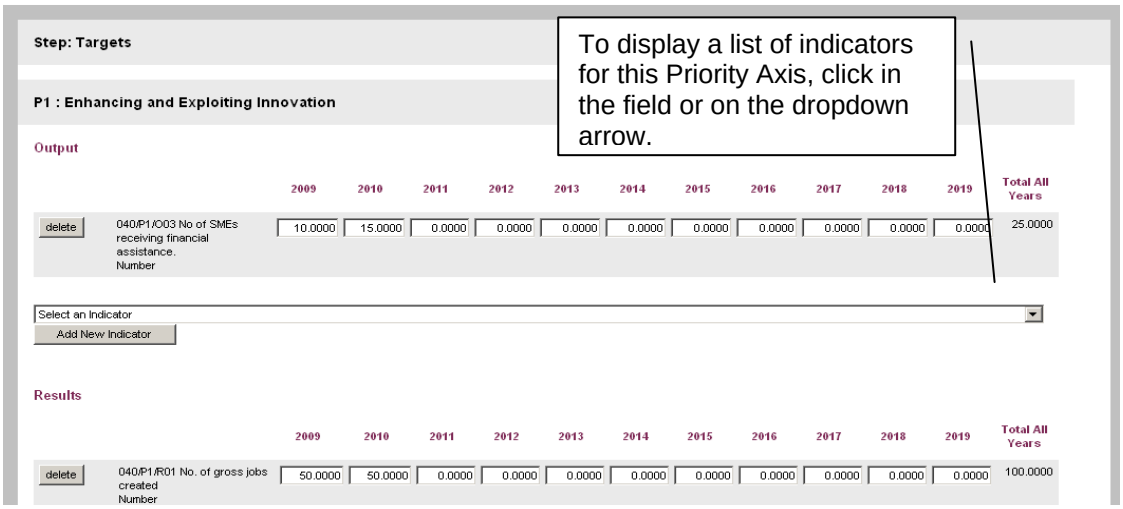
To display this screen

Click on the **Next Step** button on the 'Claim Schedule' screen, or click the 'Targets' link in the Steps navigation pane.

About this screen

This screen captures details of the targets against each of the Priority Axis selected in the Project and Applicant Details. The targets are categorised by 'output', 'results' and 'impacts'.

Completing this screen


Step: Targets
To display a list of indicators for this Priority Axis, click in the field or on the dropdown arrow.
P1 : Enhancing and Exploiting Innovation
Output
2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 Total All Years
delete
040/P1/O03 No of SMEs receiving financial assistance. Number
10.0000 15.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 25.0000
Select an Indicator
Add New Indicator
Results
2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 Total All Years
delete
040/P1/R01 No. of gross jobs created Number
50.0000 50.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 100.0000

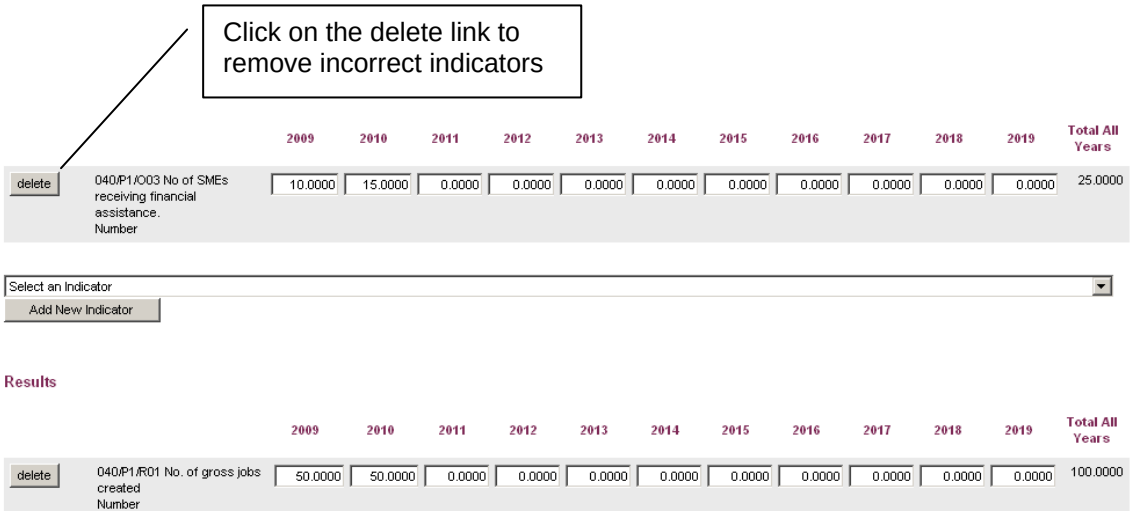
1. Click on the dropdown arrow on the 'Select an Indicator' field and select the appropriate indicator.

2. Click on the **Add New Indicator** button. Boxes to capture annual targets will display to the right.

3. Click in the first box and enter the required value. Use your tab button to move to each subsequent box, entering the appropriate value in each.

4. Repeat steps above until all targets for all Priority Axis have been added.

5. If you select a target in error, click on the delete link to remove.



6. Click on the **Next Step** button to save the data and display the Project Costs screen.

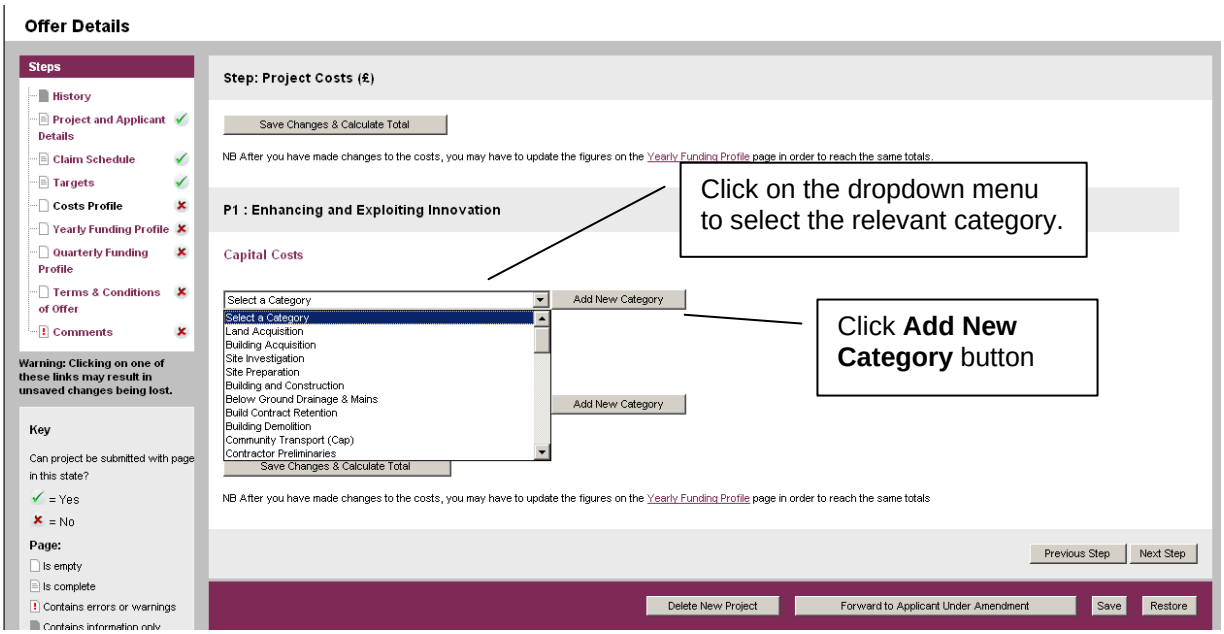
Costs Profile

To display this screen

Click on the **Next Step** button on the Targets screen.

About this screen

This screen records details of the expected capital and revenue costs of the project.



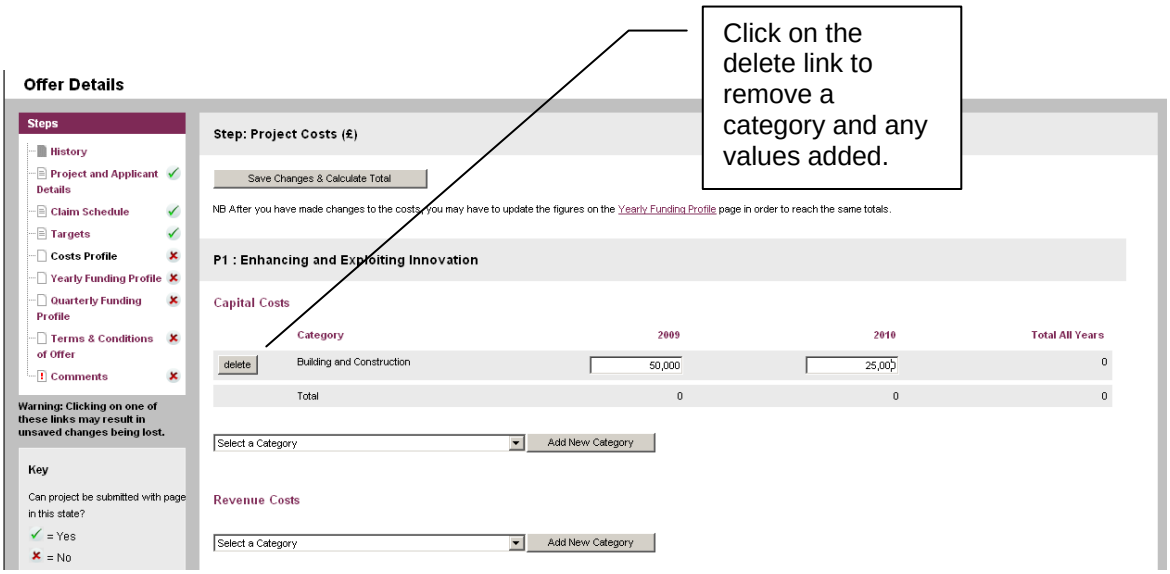
Completing this screen

1. Click on the dropdown menu to select a capital cost category.

2. Select the appropriate project cost item.

3. Click the **Add New Category** button. Boxes will display to the right to capture the annual values for that category.

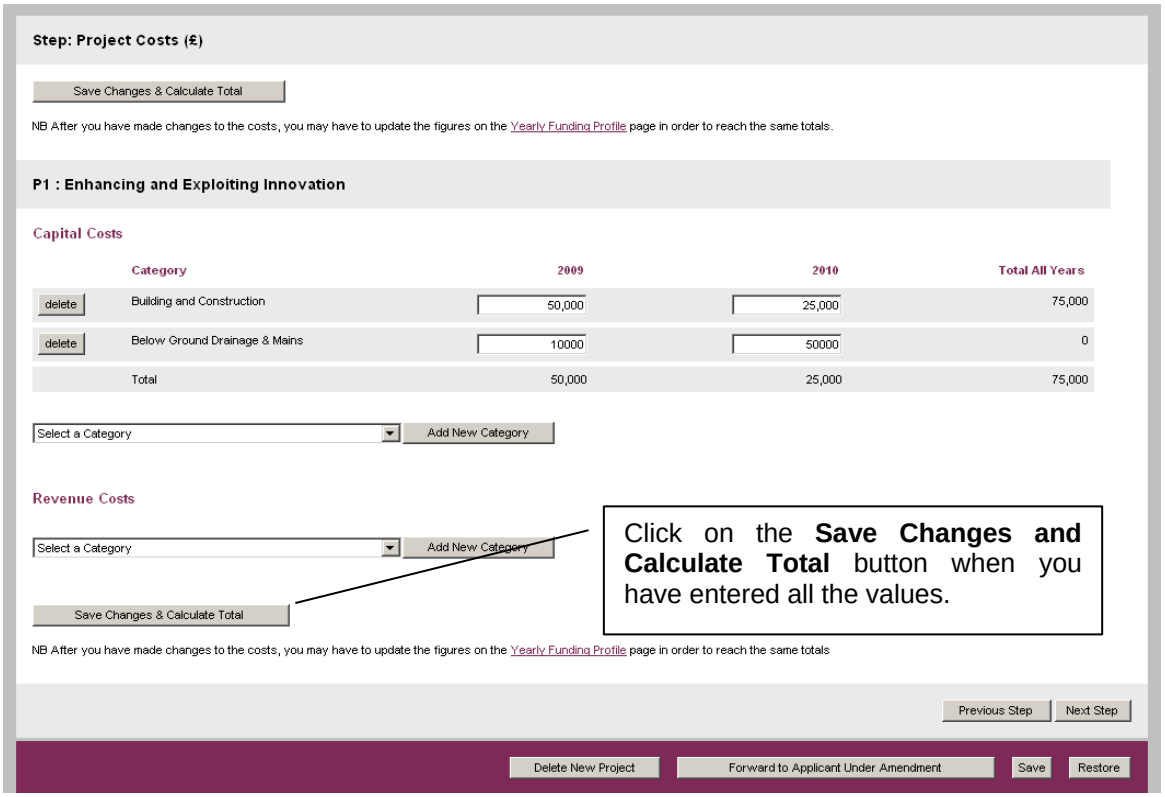
4. Enter the required values in each box presented.



5. Repeat the steps above until all capital cost categories have been entered. If you are entering a large number of categories, you may want to click on the **Save Changes and Calculate Total** button once you have entered the data for each category.

6. To enter revenue costs click on the dropdown menu. Repeat the steps outlined above to enter annual values for each revenue category selected.

7. Once all the categories are completed, click on the **Save Changes and Calculate Total** button. You will be prompted to confirm your action. Click **OK**. Totals for all years by category, and totals for Revenue and Capital Costs will display.


Step: Project Costs (£)
Save Changes & Calculate Total
NB After you have made changes to the costs, you may have to update the figures on the Yearly Funding Profile page in order to reach the same totals.
P1 : Enhancing and Exploiting Innovation
Capital Costs
Category
2009
2010
Total All Years
delete
Building and Construction
50,000
25,000
75,000
delete
Below Ground Drainage & Mains
10000
50000
0
Total
50,000
25,000
75,000
Select a Category
Add New Category
Revenue Costs
Select a Category
Add New Category
Save Changes & Calculate Total
Click on the Save Changes and Calculate Total button when you have entered all the values.
NB After you have made changes to the costs, you may have to update the figures on the Yearly Funding Profile page in order to reach the same totals
Previous Step
Next Step
Delete New Project
Forward to Applicant Under Amendment
Save
Restore

Note: If any of the figures entered into the Project Costs, Yearly Funding Profile and Quarterly Funding Profile do not match, the Project Costs Step will always display with an X, even if the error is not on the Project Costs screen. You must check all three screens to establish where the error lies.

Yearly Funding Profile

To display this screen

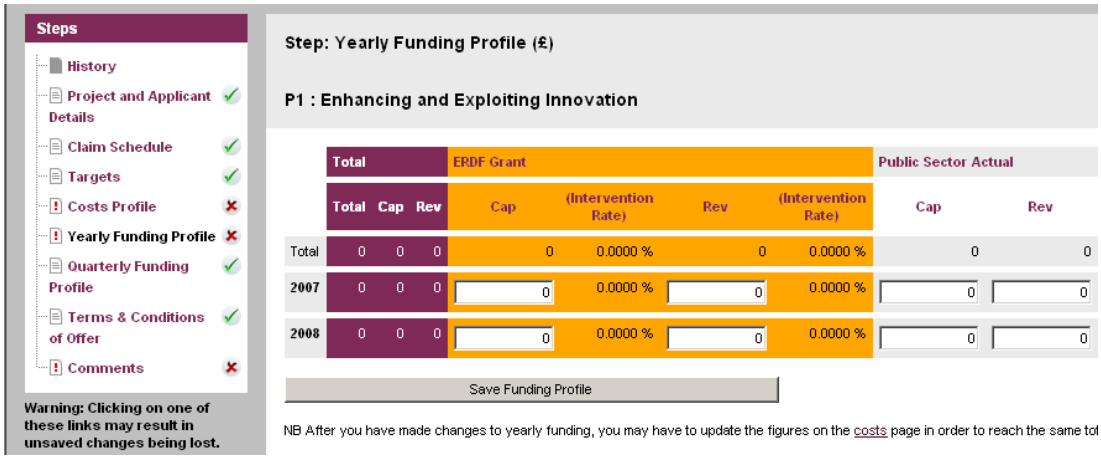
Click on the **Next Step** button from the 'Project Costs' screen or on the 'Yearly Funding Profile' link in the Steps navigation pane.

About this screen

This screen captures the annual funding profile for the project, at Priority Axis level. Total values entered for each year must be equal to the project costs entered for that year on the previous screen.

Value of Costs = ERDF + Match funding.

Once all funding values have been entered and saved, MCIS calculates and displays the annual capital and revenue ERDF intervention rates for the project. (For projects under Regional Competitiveness and Employment Programmes the headline rate is 50%, and for Convergence Programmes, 75%, however Applicant projects have no limit on the intervention rate, this should be arranged by agreement with the Applicant.)


Steps
History
Project and Applicant Details
Claim Schedule
Targets
Costs Profile
Yearly Funding Profile
Quarterly Funding Profile
Terms & Conditions of Offer
Comments
Warning: Clicking on one of these links may result in unsaved changes being lost.
Step: Yearly Funding Profile (£)
P1 : Enhancing and Exploiting Innovation
Total
ERDF Grant
Public Sector Actual
Total Cap Rev
Cap
(Intervention Rate)
Rev
(Intervention Rate)
Cap
Rev
Total 0 0 0 0 0.0000 % 0 0.0000 % 0 0
2007 0 0 0 0 0.0000 % 0 0.0000 % 0 0
2008 0 0 0 0 0.0000 % 0 0.0000 % 0 0
Save Funding Profile
NB After you have made changes to yearly funding, you may have to update the figures on the costs page in order to reach the same tol

NB: You will need to scroll to the right to view the various categories of match funding. See views 2 and 3 below.

Public Sector Actual		Public Sector In Kind		Private Sector Actual		Private Sector In Kind	
Cap	Rev	Cap	Rev	Cap	Rev	Cap	Rev
0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0

View 2, above, view 3 below.

Voluntary Sector Actual		Voluntary Sector In Kind		Planned Income		EIB/EIF loans	
Cap	Rev	Cap	Rev	Cap	Rev	Cap	Rev
0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0

Field	Description
ERDF Grant	The ERDF grant committed to the project.
Public Sector Actual	Funding provided by public sector bodies.
Public Sector In-kind	Assets or services *other than money* provided by public sector bodies.
Private Sector Actual	Funding provided by the profit generating private sector, ie companies who distribute profits to their shareholders.
Private Sector In-kind	Assets or services *other than money* provided by the profit generating private sector, ie companies who distribute profits to their shareholders.
Voluntary Sector Actual	Monetary contributions from charities and companies limited by guarantee.
Voluntary Sector In-kind	Assets or services *other than money* from charities and companies limited by guarantee.
Planned Income	The value of rental income or fees expected to be generated by the project.
EIB/EIF Loans	Funding provided by the European Investment Bank /European Investment Fund.

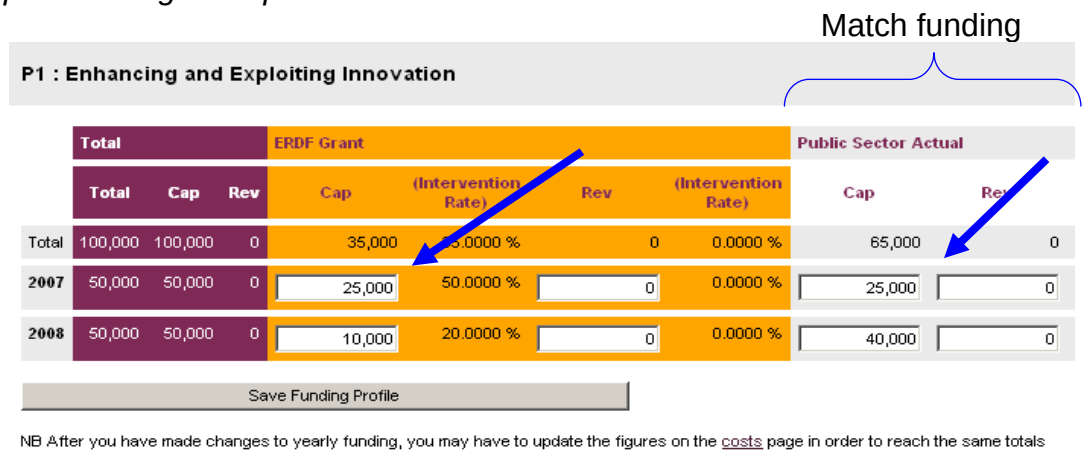
Completing this screen

1. Under the first Priority Axis, click in the ERDF Capital and/or Revenue field (as appropriate) and enter the relevant value(s) for year 1 of the project.

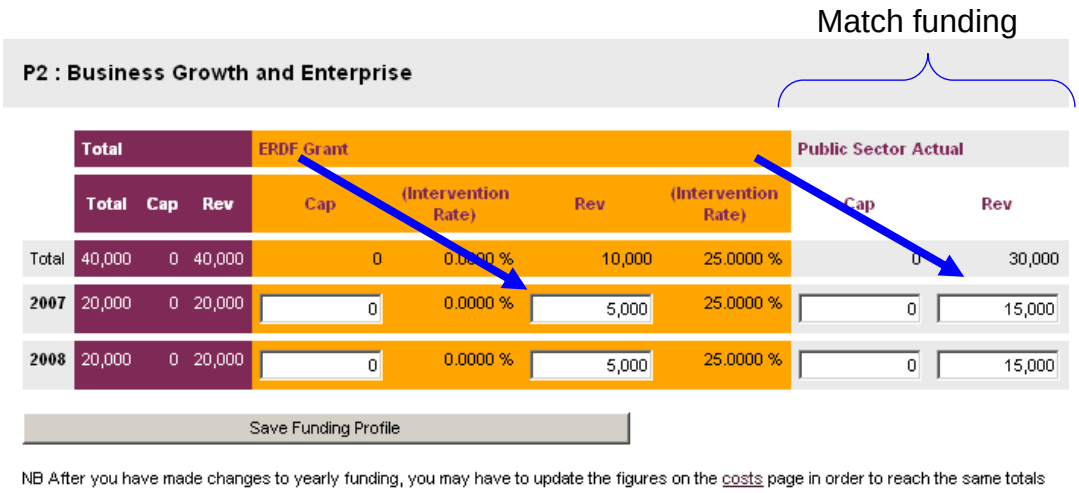
2. Tab across to the appropriate match-funding field(s) and enter the relevant value(s).

3. Repeat this process for each subsequent year and for all Priority Axis.

Capital funding example:


Match funding
P1 : Enhancing and Exploiting Innovation
Total
ERDF Grant
Public Sector Actual
Total Cap Rev
Cap (Intervention Rate) Rev (Intervention Rate)
Cap
Total 100,000 100,000 0 35,000 0 0.0000 % 65,000 0
2007 50,000 50,000 0 25,000 50.0000 % 0 0.0000 % 25,000 0
2008 50,000 50,000 0 10,000 20.0000 % 0 0.0000 % 40,000 0
Save Funding Profile
NB After you have made changes to yearly funding, you may have to update the figures on the costs page in order to reach the same totals

Revenue funding example:


Match funding
P2 : Business Growth and Enterprise
Total
ERDF Grant
Public Sector Actual
Total Cap Rev
Cap (Intervention Rate) Rev (Intervention Rate)
Cap Rev
Total 40,000 0 40,000 0 0.0000 % 10,000 25.0000 % 0 30,000
2007 20,000 0 20,000 0 0.0000 % 5,000 25.0000 % 0 15,000
2008 20,000 0 20,000 0 0.0000 % 5,000 25.0000 % 0 15,000
Save Funding Profile
NB After you have made changes to yearly funding, you may have to update the figures on the costs page in order to reach the same totals

4. When you have entered all values, click on the **Save Funding Profile** button. Each Priority Axis displays a **Save Funding Profile** button. Click on any of these buttons to save all values entered. You will be prompted to confirm your action. Click **OK.**

5. Click on the **Next Step** button to save the data and view the Quarterly Funding Profile.

Quarterly Funding Profile

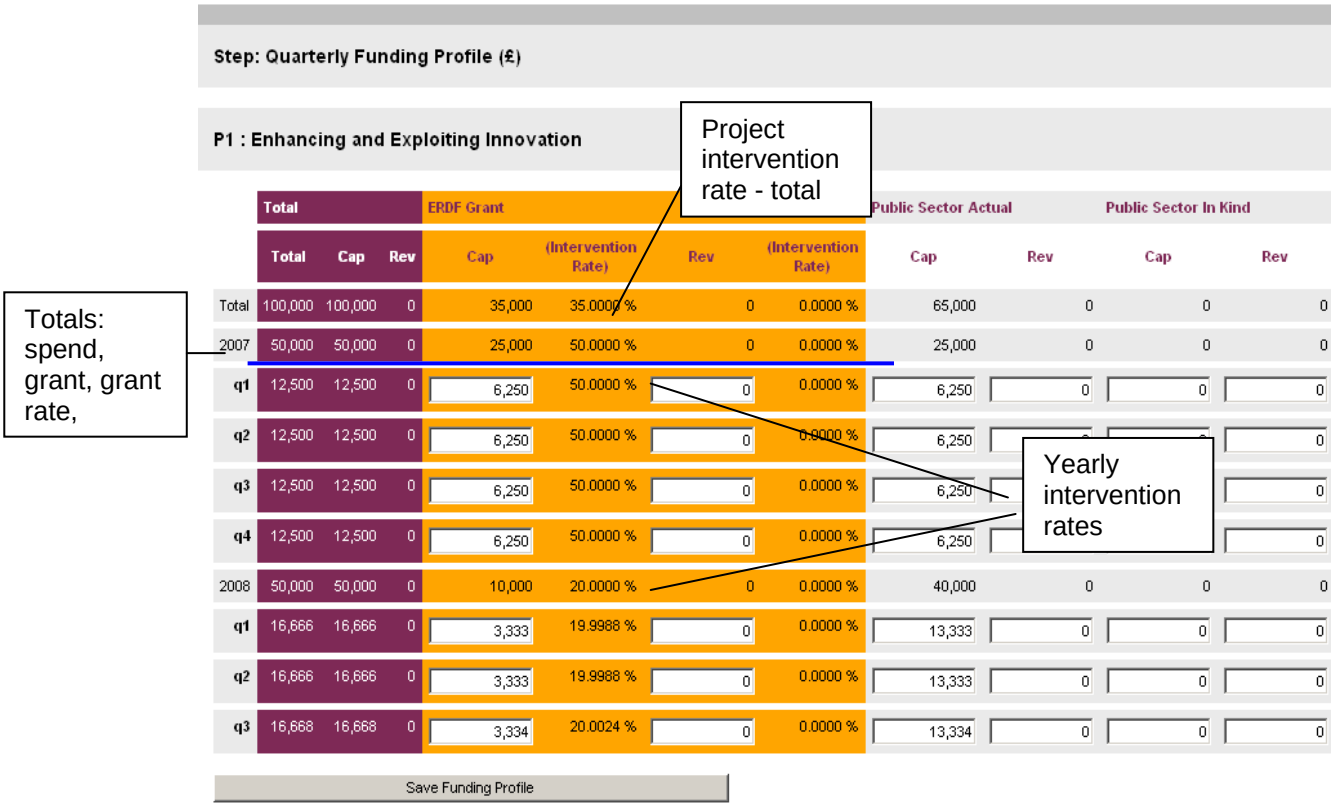
To display this screen

Click on the **Next Step** button from the Yearly Funding Profile screen.

About this screen

This screen displays a quarterly profile of the annual funding profile previously entered. The values are automatically calculated by MCIS (the annual figure is pro-rated across the four quarters), but can then be edited to reflect a more representative anticipated profile if required. The grant rate between quarters may vary in MCIS; however the total of the quarterly amounts must equal the agreed annual grant rate.

In the example shown below, the project spans two years. The default quarterly values are displayed.



	Total	Cap	Rev	ERDF Grant Cap	(Intervention Rate)	ERDF Grant Rev	(Intervention Rate)	Public Sector Actual Cap	Public Sector Actual Rev	Public Sector In Kind Cap	Public Sector In Kind Rev
Total	100,000	100,000	0	35,000	35.0000 %	0	0.0000 %	65,000	0	0	0
2007	50,000	50,000	0	25,000	50.0000 %	0	0.0000 %	25,000	0	0	0
q1	12,500	12,500	0	6,250	50.0000 %	0	0.0000 %	6,250	0	0	0
q2	12,500	12,500	0	6,250	50.0000 %	0	0.0000 %	6,250			0
q3	12,500	12,500	0	6,250	50.0000 %	0	0.0000 %	6,250			0
q4	12,500	12,500	0	6,250	50.0000 %	0	0.0000 %	6,250			0
2008	50,000	50,000	0	10,000	20.0000 %	0	0.0000 %	40,000	0	0	0
q1	16,666	16,666	0	3,333	19.9988 %	0	0.0000 %	13,333	0	0	0
q2	16,666	16,666	0	3,333	19.9988 %	0	0.0000 %	13,333	0	0	0
q3	16,668	16,668	0	3,334	20.0024 %	0	0.0000 %	13,334	0	0	0

Note: Whole numbers should be entered on this screen. If you add decimal figures, e.g. 12.50, the number is truncated to 12.

1. To amend the quarterly profile click in the relevant box(es) and re-enter the appropriate value. You must bear in mind however, that the totals must reconcile with the project costs entered, and the Yearly funding profile.

2. To save your data, click the **Save Funding Profile** button. You will be asked to confirm your action. Click **OK**. To save your data and move to a new screen, click the **Next Step** or **Previous Step** button.

Terms and Conditions

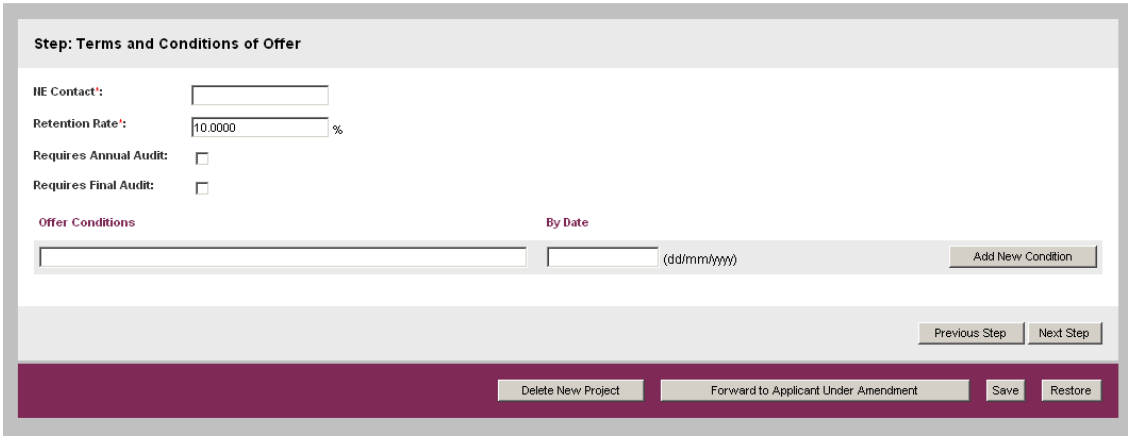
To display this screen

Click on the **Next Step** button in the 'Quarterly Funding Profile' screen or the 'Terms and Conditions' link in the Steps navigation pane.

About this screen

This screen displays a range of information about the project, including:

- Intermediate Body contact, i.e. the main Project Deliverer
- The retention rate. This defaults to 10% but can be amended subject to agreement
- Annual Audit requirement
- Final Audit requirement
- Offer Conditions and the date by when they must be met (the date is optional however).



Completing this screen

1. Enter the name of the Intermediate Body Project Deliverer responsible for this project.

2. The retention rate defaults to 10%. If you wish to vary this, subject to local policy and agreement of the Grant Approver, this can be amended. Click into the box and enter the agreed rate.

3. The Annual Audit box will be checked automatically where the grant committed to the project exceeds £250k. In the case of small projects, it is possible to check the box manually if this is required.

4. The Final Audit box will be checked automatically if the project grant is over £50k for an LA project or over £20k for a non LA project. In the case of small projects, it is possible to check the box manually if this is required.

5. If there are any conditions upon which the offer of grant is predicated, these must be entered, together with the dates by which they must be met. Click in the Offer Condition field and add the first condition. Click in the Date field and enter a date in the indicated format, if required. To add further conditions, click on the **Add New Condition** button.

6. Click on the **Next Step** button to save the data. The 'Comments' page will be displayed.

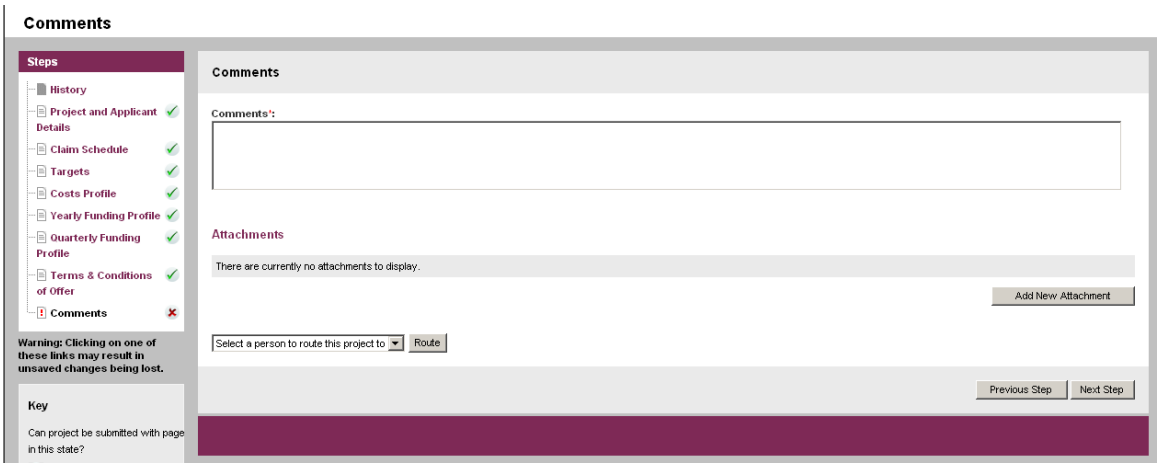
Comments

To display this screen

If the user is working their way through the step boxes using the Next Step button then this will be the final page presented. Alternatively, click on the Comments Sheet link in the Steps navigation pane under the Offer Details tab.

About this screen

The Comments page is a mandatory field in MCIS. It requires the user to enter comments that will become part of the eternal audit trail of the project to show the work-flow processes it has been through, and the users which have edited, reviewed or created it.



The comment entered in the comments box should be a meaningful comment or instruction to the user role in the next stage of the work-flow process. The recipient of the project offer will depend on the action selected once the comments are validated.

Note: Any attachments that are added on this screen will also be stored in the eternal History, and can be accessed by all users who have access to the project.

Once the comment or instruction has been entered, click **Next Step** or **Previous Step** to validate the comment.

When the comment has been validated and the Step box signals all green ticks, the following options will be given to the Project Deliverer;

- **'Forward to Pending Approval'** for the Grant Approver in the Intermediate Body to review the proposed project, described on page 40.

- **'Route'** the funding agreement offer to another named Project Deliverer for review, described on page 43.

- **'Forward to applicant under amendment'** for the applicant to enter project information or to review the work done so far by the Project Deliverer, described on page 44.

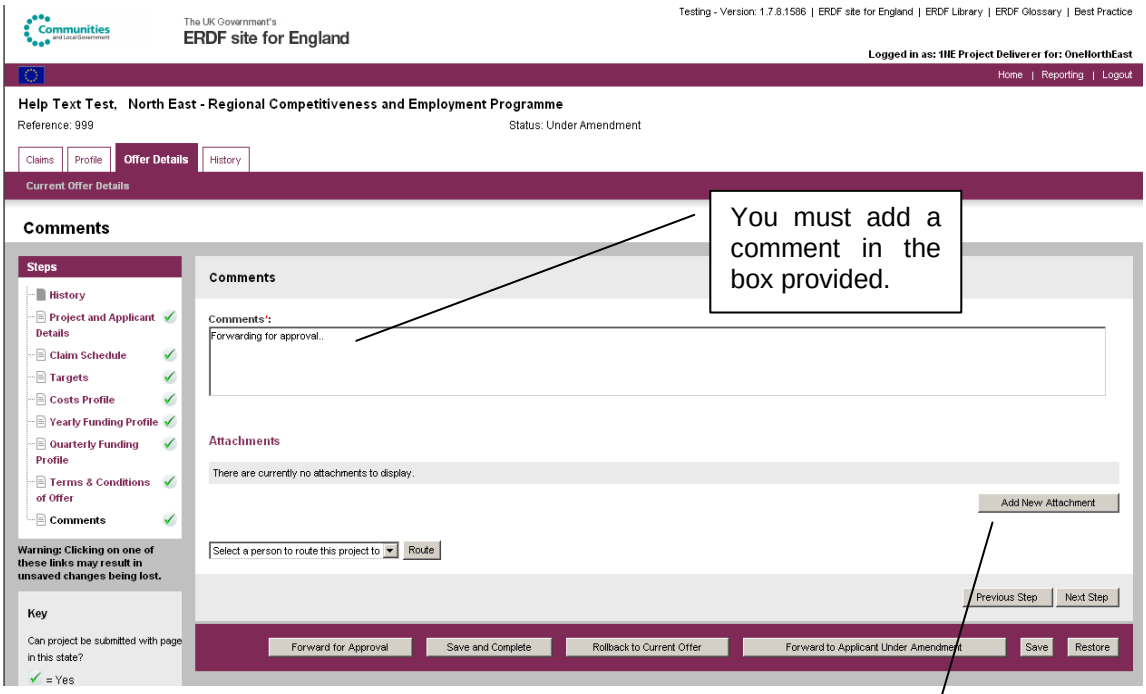
Note: Details on how to complete these processes are described on the specific page given above.

Forward an offer for approval

When you have entered all required information in the Offer Details pages as described above, enter a comment and upload any file attachments with supporting information. When the comment has been validated and a green tick appears in the step-box you can then submit the project to the Grant Approver for review.

About this screen

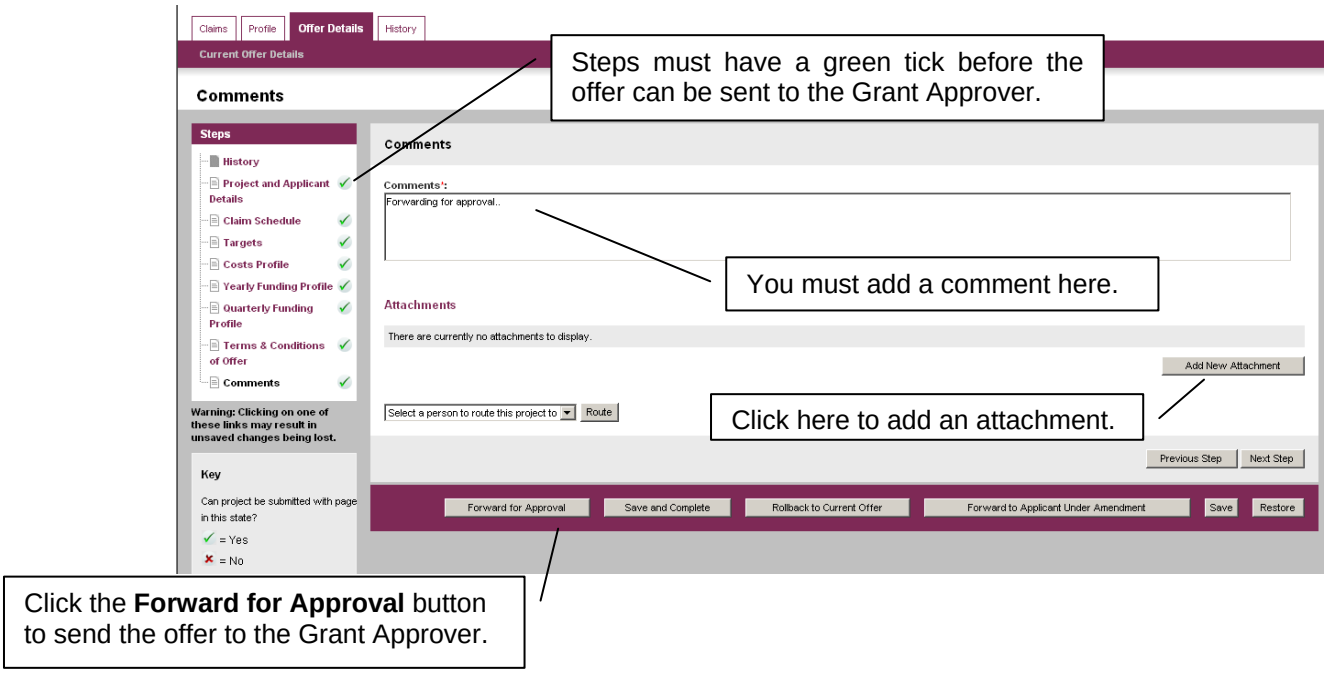
The Comments Sheet captures the comments the user wishes to attach to the project in the processing of the project.



Completing this screen

1. Review the Steps navigation pane and make sure all Steps below the History link display with a green tick. If any show with red crosses, MCIS will not allow the offer to be sent for approval.

2. Click into the box under the comment box and type your comment or instruction for the Grant Approver.



3. To add a file, click on the **Add Attachment** button:

    a. Click on the **Browse** button.

    b. Navigate to where the file you wish to attach is stored.

    c. Select the file and click 'Open'. The file name will appear in the 'Local File (required):' field.

    d. Enter a title for the attachment in the Title field.

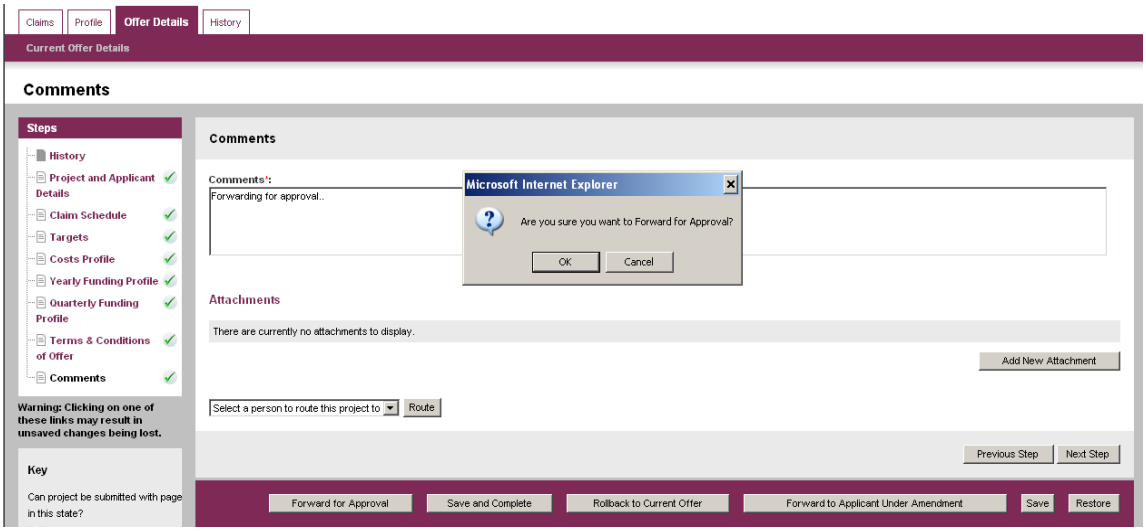
    e. Click on the **Upload Attachment** button.

    f. Click on the **Abandon Upload** button if you have chosen the wrong item to attach. Select the correct item and then repeat steps.

    g. If you wish to add more than one attachment, repeat the upload process.

4. Click the **Forward for Approval** button.

5. A warning message will display. If you are sure you wish to send the offer to the Grant Approver, click **OK**.



6. Your Home Page (Task List) displays.

   If you search for the project, you will see the status has changed to ‘Pending Approval’.

7. When the Grant Approver has reviewed the offer details and returned it to you, either ‘approved’ or ‘rejected’, a notification will appear in your Task List.

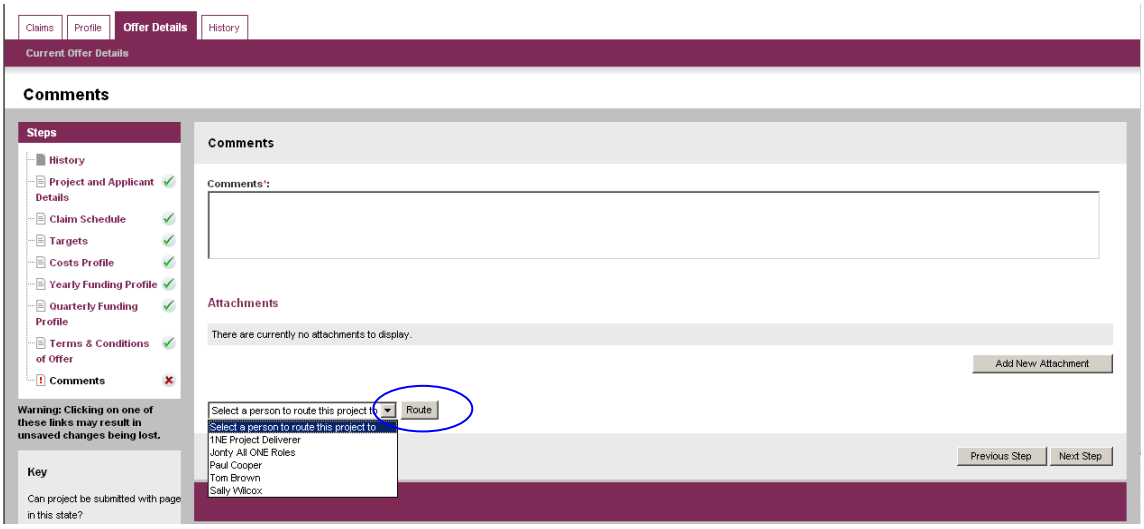
Route an Offer

The 'Route' function allows you to send the funding agreement to another named MCIS user with the Project Deliverer role, for review or action, prior to forwarding it on to the next stage in the workflow.

To route an offer:

1. Enter your comment in the Comments Box.

2. Click on the Route field or down arrow. A dropdown list of users to whom you are able to route the offer will display.



3. Select the appropriate person and click on the **Route** button. You will be prompted by MCIS to confirm this action. Click **OK.**

4. Your home page will display.

5. If you search for the project it will display as 'routed', to the name of the recipient.

Note: You can only use the 'route' function if you have the Team Leader flag set against your user ID. If you are unsure if you have been given the Team Leader setting, contact your Intermediate Body User Administrator.

Note: This route function will be visible at all times, however it will not be accessible until a comment has been entered into the comments box.

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Forward to Applicant under Amendment

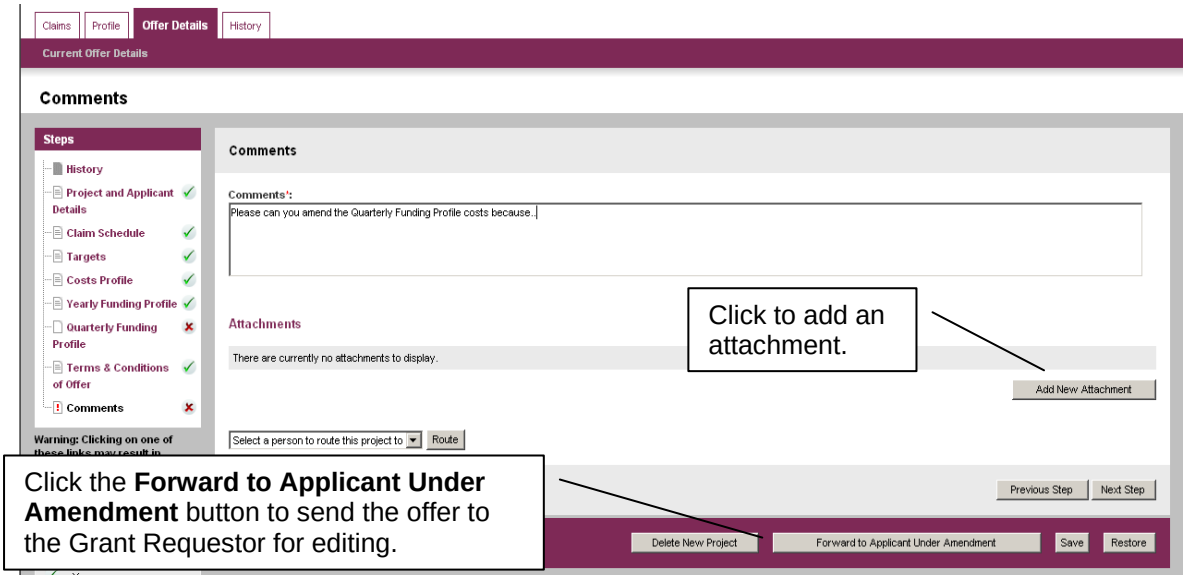
MCIS allows the user to forward a project to the Grant Requestor so that he/she is able to enter data, such as cost, funding or target information, directly onto the system.

This feature is only available when the offer is in 'draft' status, i.e. before it is sent to the Grant Approver for review. It is available at any point in the draft process and therefore there does not have to be green ticks in all of the Step boxes in order to proceed with this action.

To forward a project to the Applicant for input:

1. Search for and open the project you wish to send if you do not already have it open.

2. Click on the Offer Details tab and select the Comments page from the Step-box.



3. Click in the comments box and add your comments/instructions for the Grant Requestor.

4. If necessary, add an attachment(s) to provide additional information. To add a file, click on the **Add Attachment** button:

    a. Click on the **Browse** button.

b. Navigate to where the file you wish to attach is stored.

c. Select the file and click 'Open'. The file name will appear in the 'Local File (required):' field.

d. Enter a title for the attachment in the Title field.

e. Click on the **Upload Attachment** button.

f. Click on the **Abandon Upload** button if you have chosen the wrong item to attach. Select the correct item and then repeat steps.

g. If you wish to add more than one attachment, repeat the upload process.

5. When you are happy with the information provided, click the **Forward to Applicant Under Amendment** button.

6. The History screen displays, showing the project has a status of 'Applicant under amendment'.

7. When the Applicant has entered or edited the offer details and returned it to you, a notification will appear in your Task List.

8. Click on the link shown under 'Required Action' to open the project. The Cover Sheet will display.

9. Review the Grant Requestor's comments shown at the top of the History.

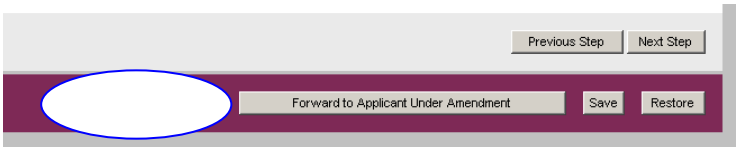
10. If you are happy with the information provided you may now send the offer to the Grant Approver for review and approval (see section below: Submit an Offer for Approval).

11. If you are not satisfied with the details entered, you may either edit the details yourself or return the offer to the Applicant for further amendment.

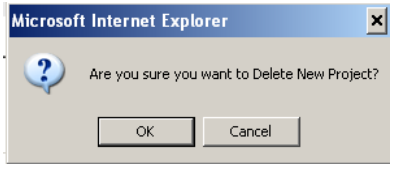
Delete a Project

At any stage during the drafting of a project it is possible to delete it by clicking on the **Delete New Project** button which appears in the bottom right corner of all Offer Details screens.

1. Scroll down and click on the Delete button.



2. You will be prompted with a warning message.

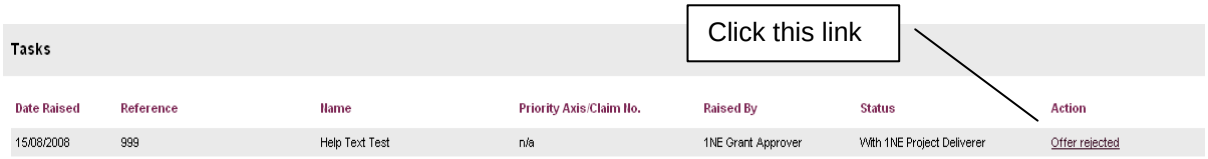


3. To confirm your action click on **OK**.

Note: After deleting a project you cannot make it live again, or edit it. However, it will still appear in the Project list with a status of 'Deleted', and will be viewable in a read-only mode.

Amend and re-submit a rejected offer

If the Grant Approver 'rejects' the offer you submitted, an 'Offer Rejected' notification will display in your Task List.



1. Click on the link to open the project.

2. Review the comments and any attachments that have been added.

3. Either, select the 'Comments' page via the step-box on the left hand-side, or continue through the offer using the **Next Step** button, enter a comment to indicate that the project is being amended.

4. Add an attachment if required.

5. Click on the Next Step button to save your comment and display the **Amend** button.

6. Click on the **Amend** button. You will be prompted to confirm your action. Click **OK**.

7. The project will become editable. Make the necessary changes, clicking on the **Next Step** or **Previous Step** buttons to save changes made.

8. Either, select the 'Comments' page from the step box, or continue through the offer until the end, enter a comment to indicate that the project has been amended.

8. Click on the **Next Step** button to save your changes and to display the **Forward for Approval** button.

9. Click on the **Forward for Approval** button to return the project to the Grant Approver.

Note: For more information about each of the screens, and the information to be entered, refer to the section on creating a project, or click on the Page Help at the top right of the screen.

Note: Click on the **Save** button if you want to save your changes.

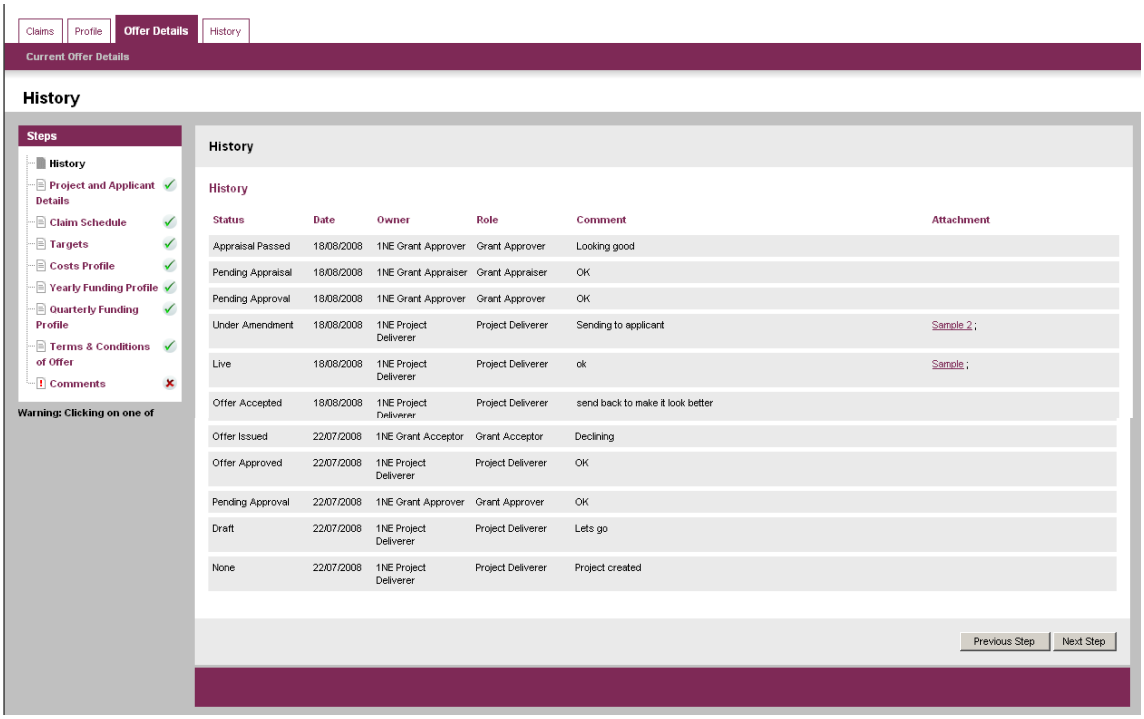
Note: Click on the **Restore** button if you want to restore the original values. You must do this before you click on Save, Next Step or Previous Step. If you have clicked on any of the above buttons, the Restore button will not perform any action.

Issue an offer

When the Grant Approver has approved an offer a notification stating: 'Offer approved – send offer to applicant' will appear in your Task List.

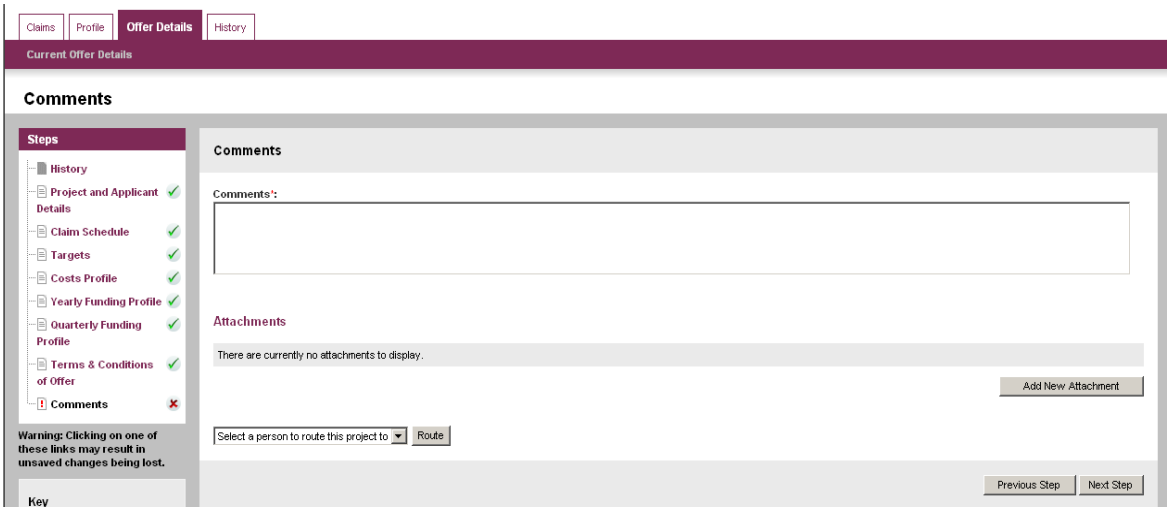
1. Click on the 'Offer approved – send offer to applicant' link in your Task list to open the project.

2. The History screen displays.



3. Review the offer using the **Next Step** button or selecting the required pages via the step-box on the left hand-side.

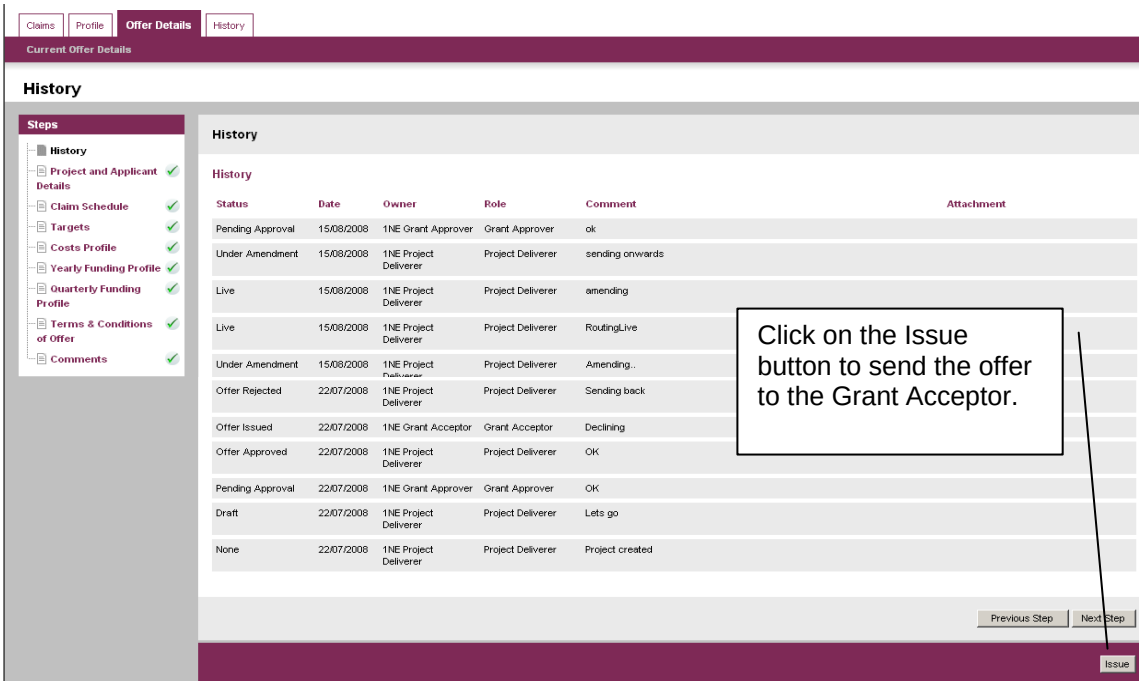
4. The Comments page is the final page, enter a comment.



5. Under History, review the Grant Approver's comments, which will be listed at the top. As the offer has been approved, these should state that the Grant Approver is happy with the project and no amendments are required.

6. Click in the Project Deliverer Comments Box and enter a comment. This will be displayed to the recipient of the offer, the Grant Acceptor.

7. Click the **Next Step** button to save your comment and display the **Issue** button.


Claims
Profile
Offer Details
History
Current Offer Details
History
Steps
History
Project and Applicant Details
Claim Schedule
Targets
Costs Profile
Yearly Funding Profile
Quarterly Funding Profile
Terms & Conditions of Offer
Comments
History
History
Status
Date
Owner
Role
Comment
Attachment
Pending Approval 15/08/2008 1NE Grant Approver Grant Approver ok
Under Amendment 15/08/2008 1NE Project Deliverer Project Deliverer sending onwards
Live 15/08/2008 1NE Project Deliverer Project Deliverer amending
Live 15/08/2008 1NE Project Deliverer Project Deliverer RoutingLive
Under Amendment 15/08/2008 1NE Project Deliverer Project Deliverer Amending..
Offer Rejected 22/07/2008 1NE Project Deliverer Project Deliverer Sending back
Offer Issued 22/07/2008 1NE Grant Acceptor Grant Acceptor Declining
Offer Approved 22/07/2008 1NE Project Deliverer Project Deliverer OK
Pending Approval 22/07/2008 1NE Grant Approver Grant Approver OK
Draft 22/07/2008 1NE Project Deliverer Project Deliverer Lets go
None 22/07/2008 1NE Project Deliverer Project Deliverer Project created
Click on the Issue button to send the offer to the Grant Acceptor.
Previous Step
Next Step
Issue

8. Click on the **Issue** button.

9. Your Home page displays.

10. If you then search for the project, you will see that the status displays as ‘Offer Issued’.

Enter required non-contractual details

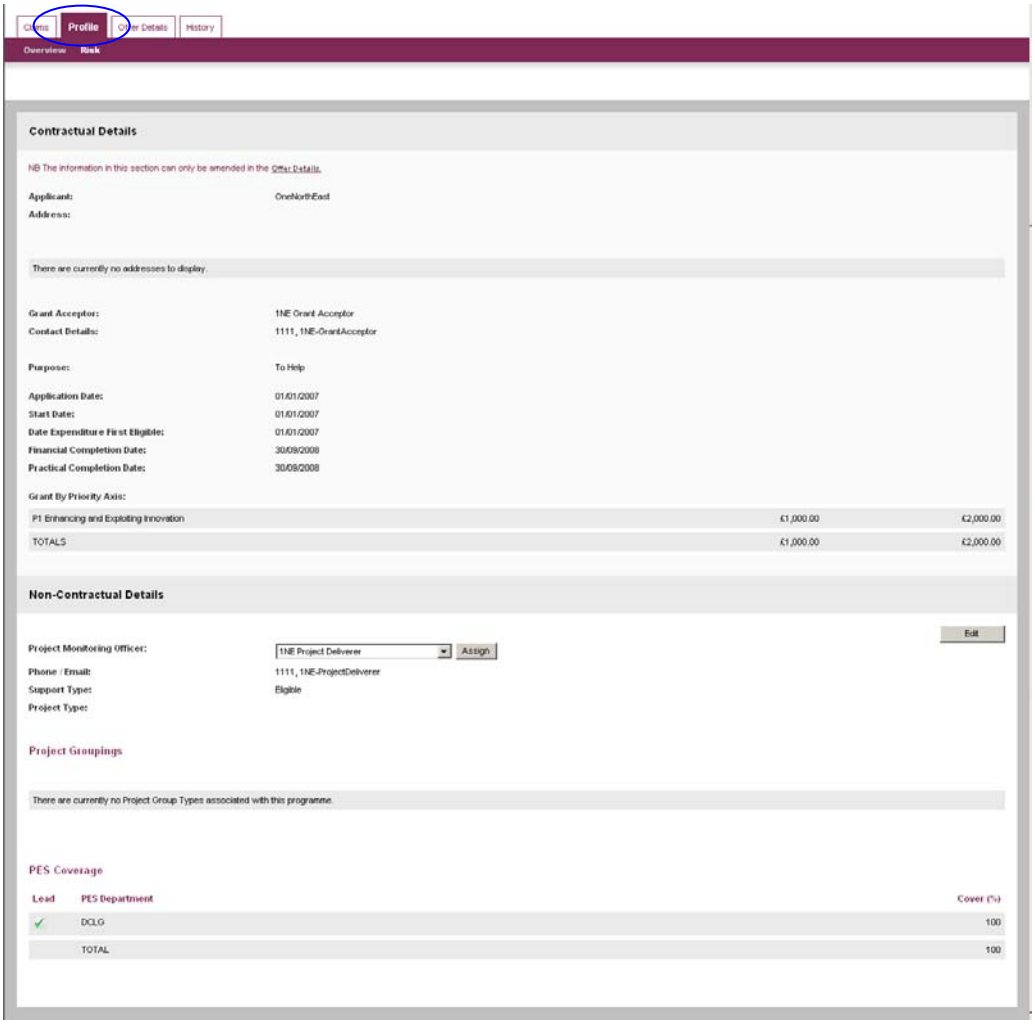
In addition to the information recorded in the project offer, there are a number of non-contractual, project and applicant details that must be recorded on MCIS before a project can be made live. These details are entered and edited on the Profile Overview screen.

If you attempt to make a project live and these details are not entered, MCIS will display error messages indicating what information is missing.

Overview screen

To display this screen

If necessary, search for the project and click on the relevant **Project Name** link to open. The Project Profile Overview screen will display. You can return to this screen at any time, when you have a project open, by clicking on the **Project Profile** tab.



About this screen

The Overview screen records and displays a range of contractual and non-contractual details for the project.

The upper half of the screen provides a summary of information from the offer.

Field	Description
Contractual Details (changes require revised funding agreement):	
Applicant and Address	The name and the address of the organisation responsible for the project.
Grant Acceptor	Lead contact: first name, last name, phone number and email address.

Field	Description
Project Purpose	This is a brief, high level summary of the project purpose.
Key Dates	Key dates for the project displayed here are: 1. The start date of the project 2. The date from when project expenditure is eligible 3. The date the project is scheduled to have completed all its targets. 4. The date by which the project must have claimed all its eligible expenditure (Financial Completion).
Grant by Priority Axis	The Priority Axes under which the project will deliver its outputs, the approved eligible expenditure and the grant awarded against each Priority Axis and the total values.

The lower section records important project details not included within the contract. Users with Project Deliverer roles may edit this section; all other users will have read-only access. The Intermediate Body Project Deliverer who is the project owner is responsible for ensuring these details are complete and kept up-to-date.

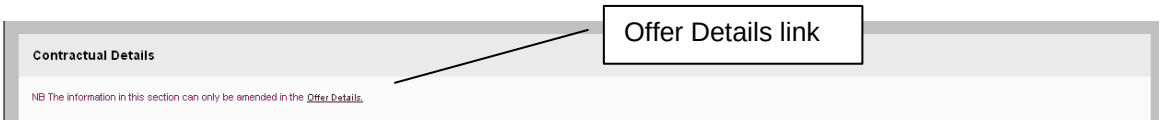
Non-Contractual Project Details:	
Project Deliverer and Contact details	The name of the person in the Intermediate Body to whom the project has been assigned and their phone/email details.
Support Type	This can be either Eligible or In Transition

PES Coverage	PES (Public Expenditure Survey) Cover refers to the government departments that underwrite the award of grant and their respective share of the cover expressed as a percentage. A green tick indicates the lead PES department i.e. that with the largest percentage share of the cover.

Completing this screen

Contractual Details

The information in the Contractual Details section can only be amended in the Offer Details screens. Click on the 'Offer Details' link to display the Offer Overview page, from where you can navigate to the required screen.

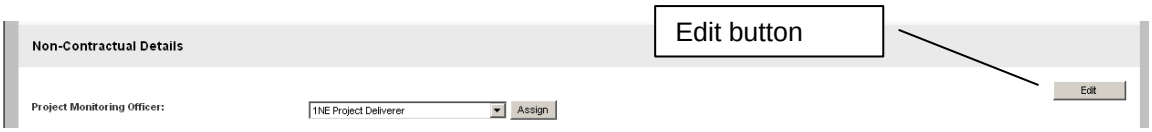


If any changes to details in the Contractual Details section are required, the offer letter must be re-issued.

Non-contractual Project Details

To add or amend details in this section, you must have a Project Deliverer role. All details are mandatory apart from Project Grouping.

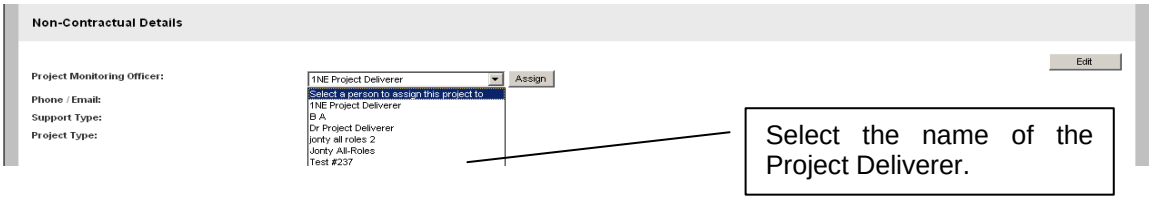
1. Click the **Edit** button. All fields will re-display in edit mode – see below for a description of each.



Intermediate Body Contact Information

A project can be assigned to a Project Deliverer within the Intermediate Body.

1. To assign an owner for the project, click in the Project Deliverer field. A list of names of people within the Intermediate Body with the Project Deliverer role displays.



2. Select the appropriate name and click the **Assign** button. This person becomes the project 'owner' and as such is responsible for keeping project details on MCIS updated.

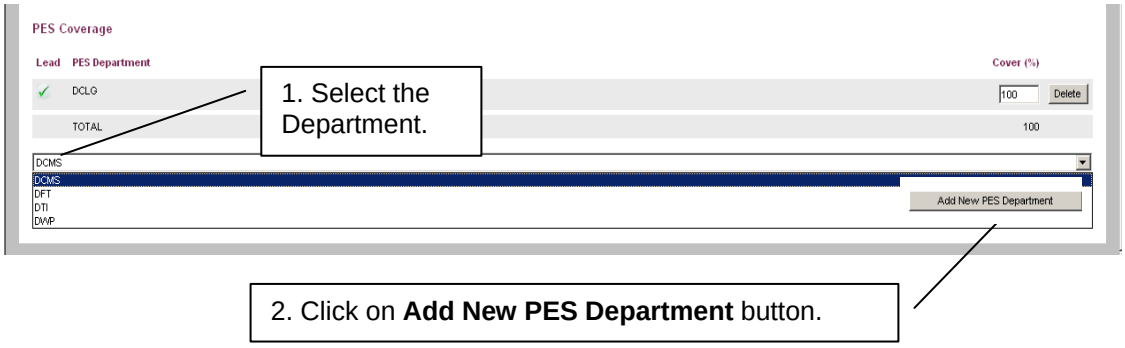
3. To re-assign a project, select the relevant name from the list and click on the **Assign** button.

PES Cover

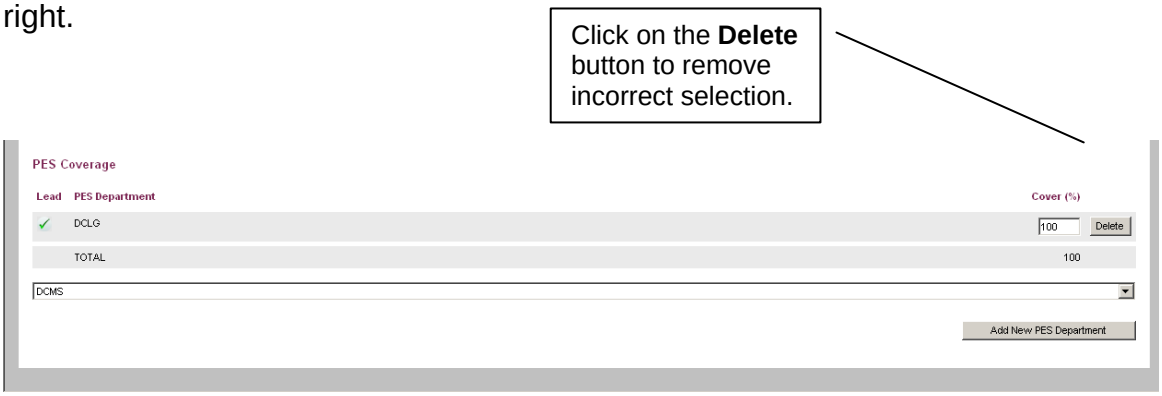
Click in the PES field and select the appropriate government department from the list displayed. Click on the **Add New PES Department** button.

If PES Cover is split across a number of departments, repeat this process to add further departments as required.

Against each department you have selected, click in the % Cover field and enter the appropriate percentage. The total PES cover specified must add up to 100%.

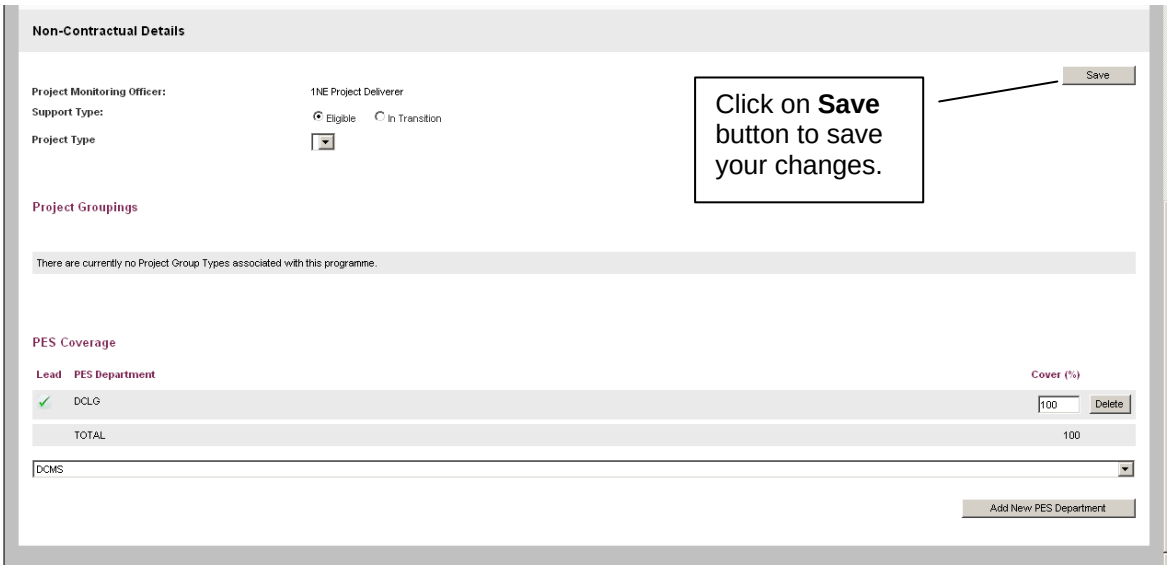


To remove a selection added in error, click the **Delete** button displayed to the right.



Save details

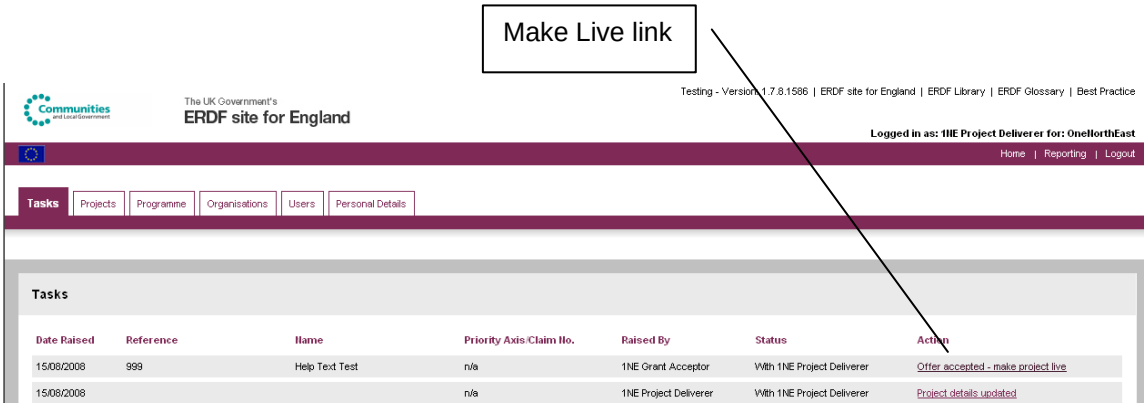
When you have added all necessary information, scroll up until the **Save** button displays. Click on the **Save** button. The Project Profile Overview page redisplays with the information you have entered.



Make a Project Live

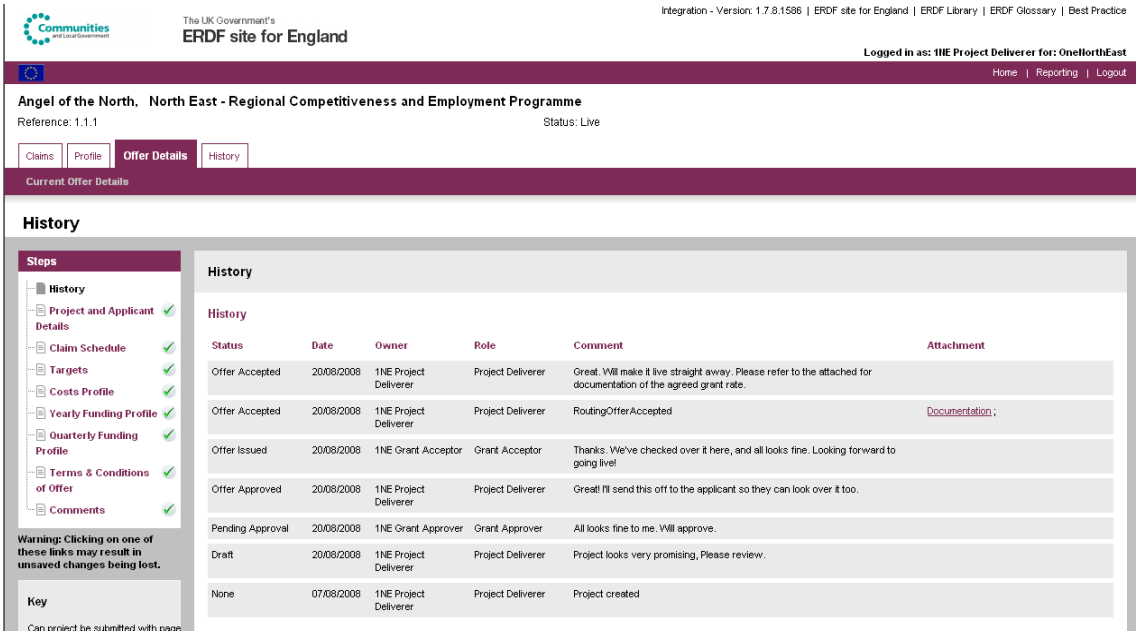
When the project has been reviewed and accepted by the Grant Acceptor, a notification will appear in your Task list instructing you to make the project live.

1. Click on the Make Live link.



2. The History displays.

3. The comments added by the Grant Acceptor will display at the top. Review these comments.

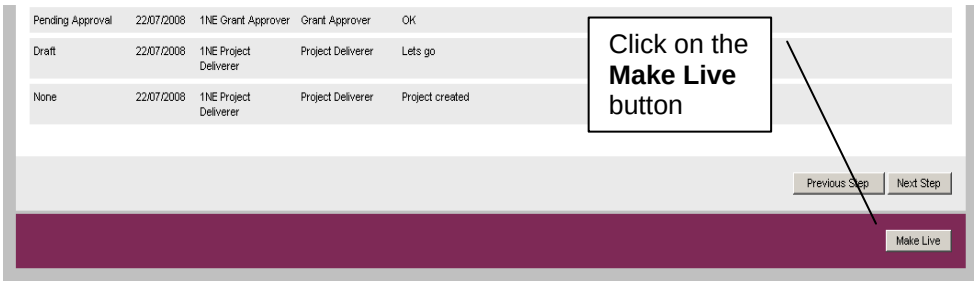


4. If you are satisfied, click in the Project Deliverer Comments box and enter your comment indicating that you are making the project live.

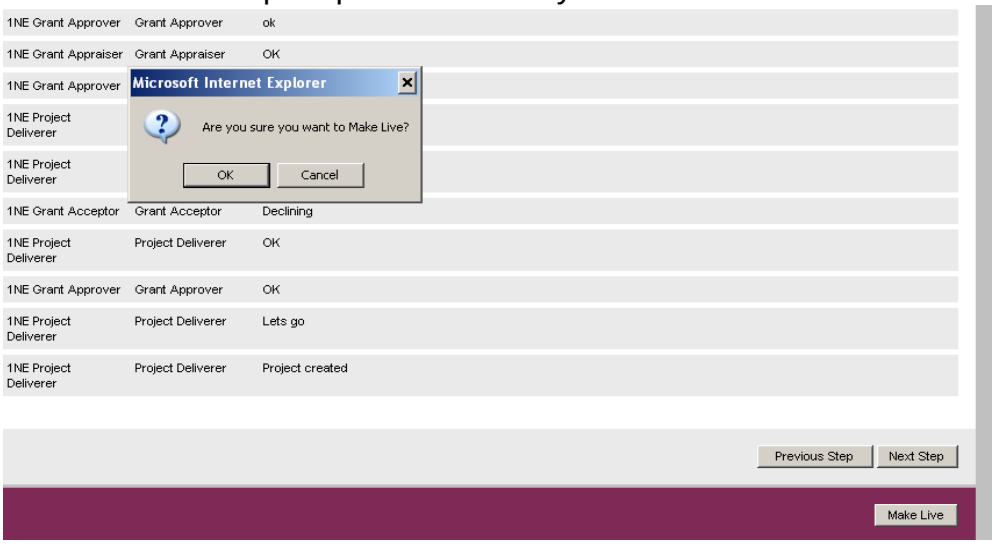
5. If required/desired, add an attachment.

6. Click on the **Next Step** button.

7. The **Make Live** button displays in the bottom right corner of the screen. Click the **Make Live** button.


Pending Approval 22/07/2008 1NE Grant Approver Grant Approver OK
Draft 22/07/2008 1NE Project Deliverer Project Deliverer Lets go
None 22/07/2008 1NE Project Deliverer Project Deliverer Project created
Click on the **Make Live** button
Previous Step
Next Step
Make Live

8. You will be prompted to confirm your action. Click on the **OK** button.


1NE Grant Approver Grant Approver ok
1NE Grant Appraiser Grant Appraiser OK
1NE Grant Approver
1NE Project Deliverer
1NE Project Deliverer
1NE Grant Acceptor Grant Acceptor Declining
1NE Project Deliverer Project Deliverer OK
1NE Grant Approver Grant Approver OK
1NE Project Deliverer Project Deliverer Lets go
1NE Project Deliverer Project Deliverer Project created
Microsoft Internet Explorer
Are you sure you want to Make Live?
OK
Cancel
Previous Step
Next Step
Make Live

Note: If any required project information is missing, an error message will display indicating what data must be entered before you can make the project live. See section above: Enter or Edit non-contractual details.

The Overview page redisplays. Scroll up. At the top left hand corner, you will see that the status of the project has changed to Live.

Set risk rating

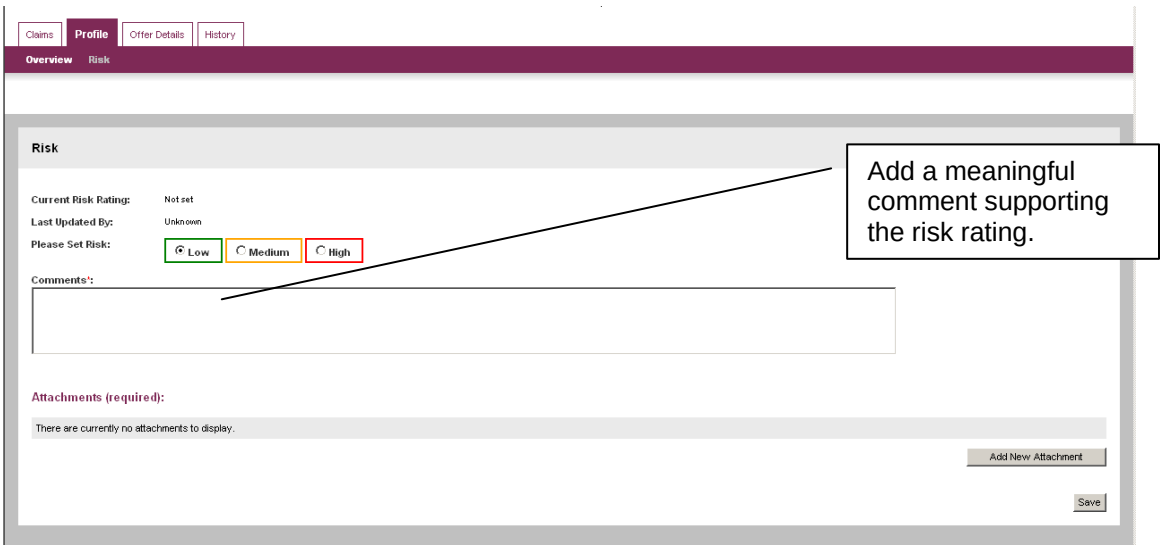
Each live project should be assigned a risk rating on MCIS. New projects set up on MCIS should be risk-rated prior to making them live.

The project should be risk assessed on an ongoing basis using the local (Intermediate Body) risk assessment form, and the findings registered and maintained on MCIS.

The risk rating for each project is displayed alongside the cost and output variance ratings in the Search results 'performance dashboard'.

To display this screen

Search for and open the project you wish to assign a risk-rating to. The Project Profile Overview page will display. Click the Risk link displayed.



About this screen

This screen records the risk rating for the project.

The current risk rating of the project is displayed at the top of the screen. If a risk rating has not yet been assigned, the message 'Not set' will display.

Completing this screen

1. Select the level of the risk by clicking on the Low, Medium or High radio button.

2. Add comments that give the reason for the level of risk chosen.

3. You must also attach a file (the completed local risk assessment form or matrix) to support the selected risk rating. To upload the file:

   a. Click the **Add Attachment** button

   b. Click on the **Browse** button. A 'Choose File' pop-up window will display.

   c. Navigate to where the attachment is stored.

   d. Select the item to attach and click on the **Open** button.

   e. Enter a title for the attachment in the Title field and add a description if necessary.

   f. Click on the **Upload Attachment** button.

   g. Use the **Abandon Upload** button if you have chosen the wrong item to attach. Select the correct item and then repeat the above steps.

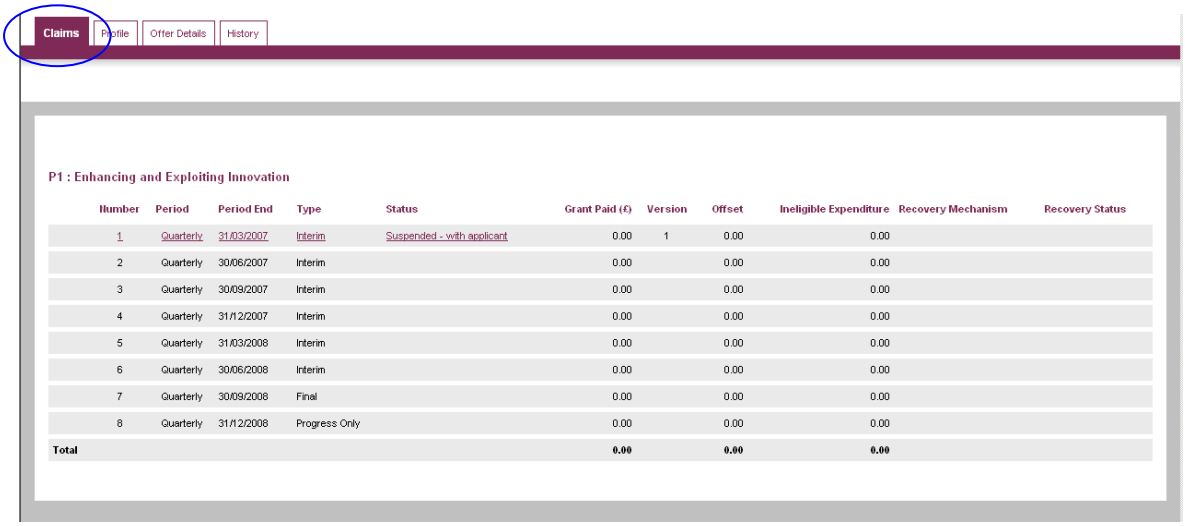
4. Click on the **Save** button to save your data.

5. If you now search for the project you will see the assigned risk rating is displayed in the search results.

Claims

To display this screen

If necessary search for and open the project. Click on the 'Claims' tab.


Claims
Profile
Offer Details
History
P1 : Enhancing and Exploiting Innovation
Number Period Period End Type Status Grant Paid (£) Version Offset Ineligible Expenditure Recovery Mechanism Recovery Status
1 Quarterly 31/03/2007 Interim Suspended - with applicant 0.00 1 0.00 0.00
2 Quarterly 30/06/2007 Interim 0.00 0.00 0.00
3 Quarterly 30/09/2007 Interim 0.00 0.00 0.00
4 Quarterly 31/12/2007 Interim 0.00 0.00 0.00
5 Quarterly 31/03/2008 Interim 0.00 0.00 0.00
6 Quarterly 30/06/2008 Interim 0.00 0.00 0.00
7 Quarterly 30/09/2008 Final 0.00 0.00 0.00
8 Quarterly 31/12/2008 Progress Only 0.00 0.00 0.00
Total 0.00 0.00 0.00

About this screen

The Claims screen displays project claims for each project Priority Axis. It lists:

- The status of **all** claims; current, past and future.
- Any ineligible expenditure identified on a paid claim
- The details of any recovery of monies (clawbacks).

Click on any other of the links displayed to open the associated claim or clawback.

Column Heading	Description
Number	The claim number, arranged in chronological order.
Period	The claim frequency. Can be either Monthly or Quarterly, as arranged with the applicant. Projects with greater expenditure/grant are more likely to be organised on a Monthly claim period.
Period End	The claim period end date.
Type	*Interim*: a scheduled, non-restricted claim made during a project's life. *Progress Only*: A claim after the financial completion date, the claim only measures and reports on targets/outputs. *Final:* the scheduled final claim. *Restricted*: a claim where the retention rate (usually 10%) has been applied to the grant payable pending receipt of the final audit. *Final restricted*: a claim generated by MCIS to cater for the situation where a final claim has been submitted on which an amount must be retained pending receipt of the final audit and an amount can be paid. The final restricted claim enables the immediate payment of this second amount.
Status	Reflects the status of the transaction, e.g. draft, pending approval, on hold, etc
Amount Paid	The grant paid to the Applicant on the claim.
Version	The claim version(s). Additional versions of a claim are created when it is returned to an applicant for amendment after it has been submitted to the Intermediate Body for processing. Versions are not created if a claim is saved and then re-opened.
Offset	This shows the amount of money, previously overpaid, which has been 'offset' against a claim. Clicking on the offset link displays the offset summary screen for this particular claim.
Ineligible Expenditure*	The amount of ineligible expenditure declared on a claim. Click on the link to view details of the overpayment.

Column Heading	Description
Recovery Mechanism*	The recovery mechanism is the means by which the Intermediate Body 'claws back' an overpayment made to an Applicant. This will either be by demand note (i.e. an invoice) or by offsetting the overpayment against a future project claim, or claims. Clicking on the recovery mechanism link displays the clawback details screen.
Recovery Status*	The recovery status column provides information on progress towards recovery of the clawback, e.g.: Recovered, Pending recovery, Non-recoverable. Clicking on the recovery status link displays the clawback overview screen which contains the history of the clawback.

*Denotes future functionality.

Issue a contract variation

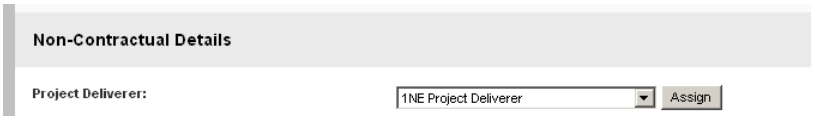
Follow the steps outlined below to issue a revised offer of grant.

Step 1: Search for and open the project

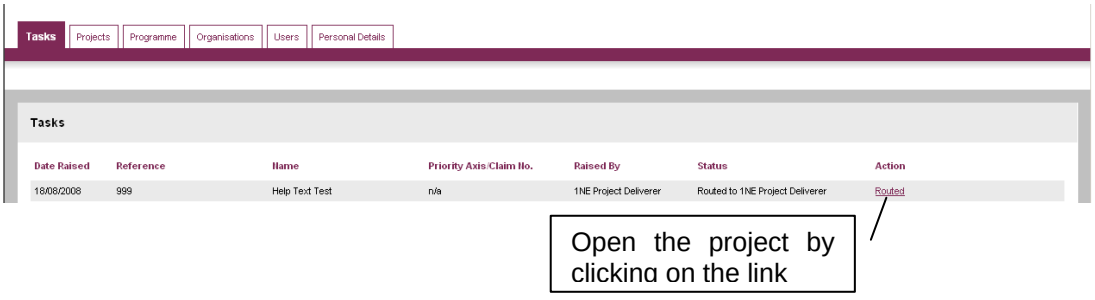
1. From your home page, click on the Projects tab.
2. Search for your project.
3. Click the link to open your project. The Project Profile Overview screen displays.

Step 2: Assign the project

1. Scroll down the Overview screen until the **Assign** button displays.

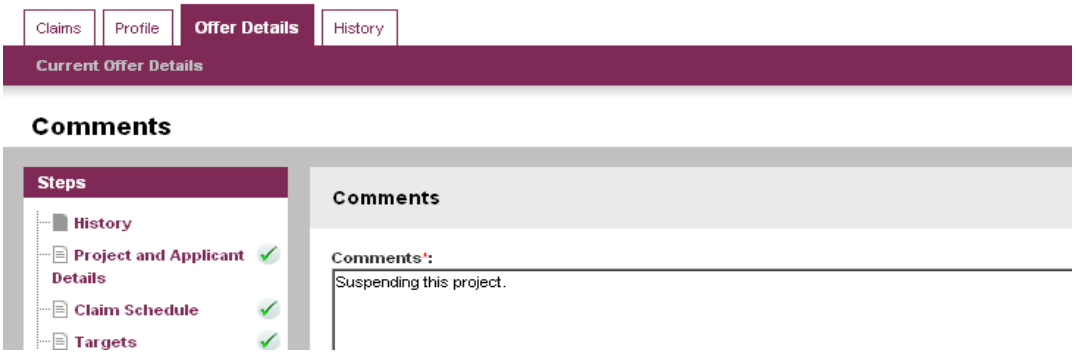


2. Click on the drop-down field to display all Project Deliverer users within the Intermediate Body. Select your name.
3. Click on the **Assign** button.
4. Click on the Home link to display your Task List. The assigned project displays in the Task list, with a required action of Routed.

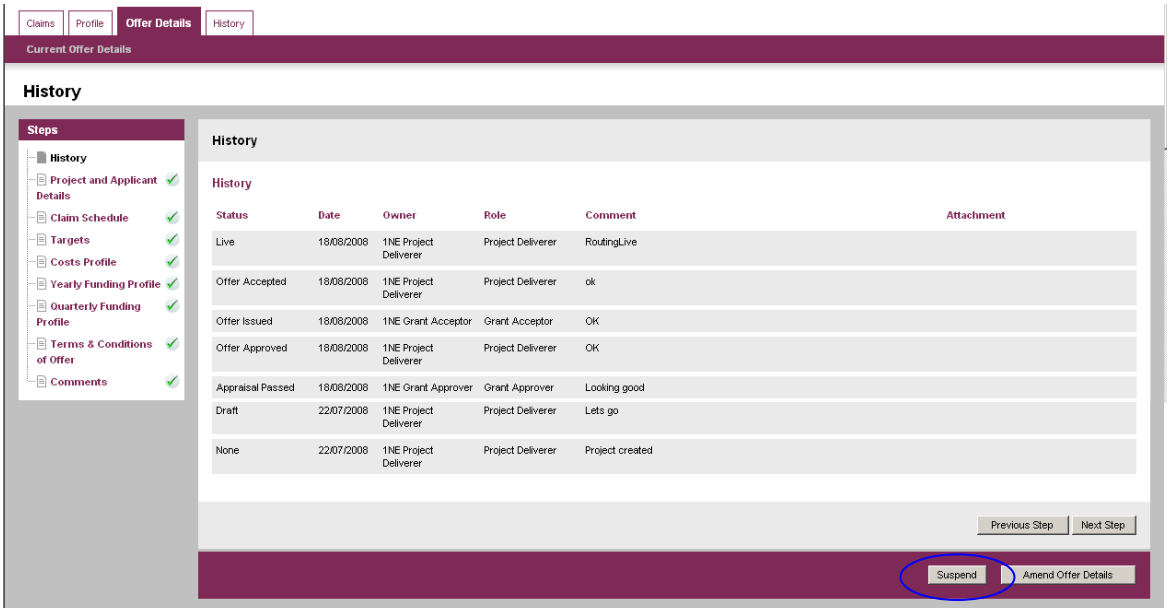


Step 3: Suspend the project

1. Click on the Routed link to open the project.



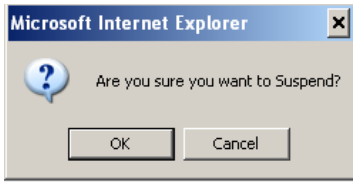
2. Add a comment to indicate that the project is being suspended and click Next Step.



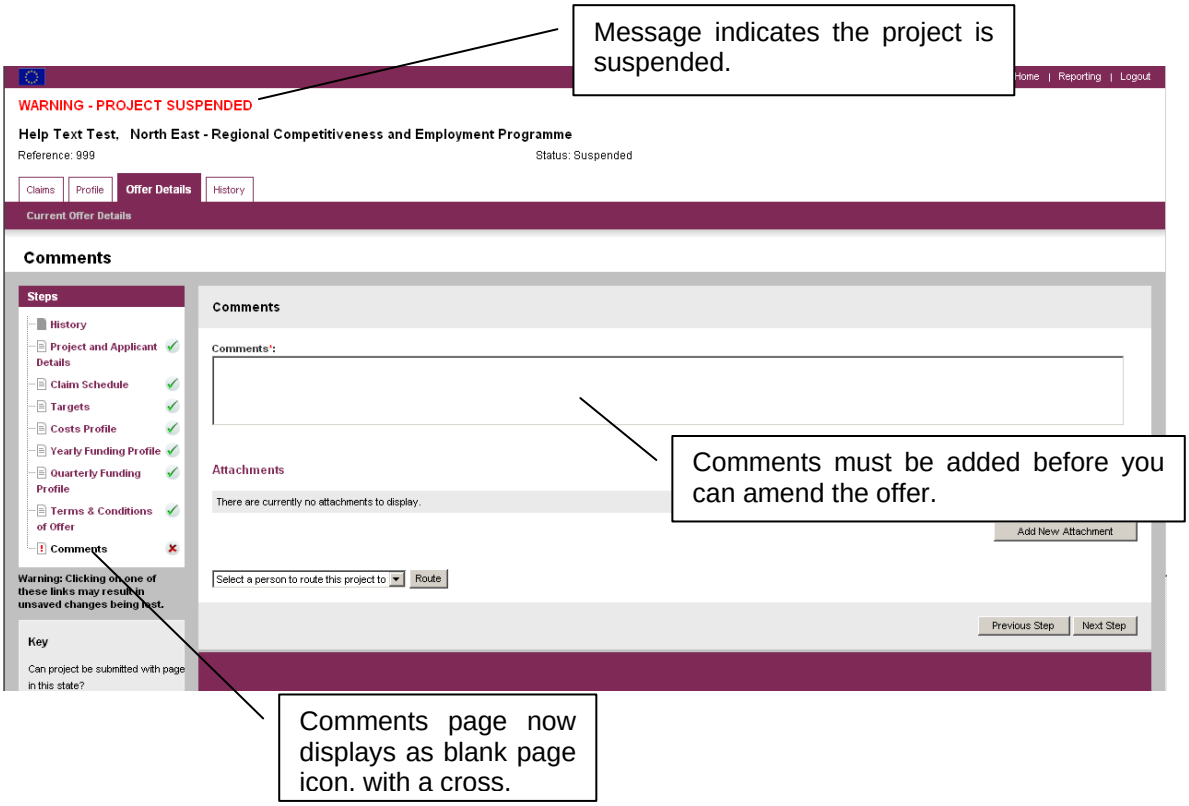
3. Scroll down to view the **Suspend** button.

4. Click on the **Suspend** button.

5. You are prompted to confirm your action by MCIS. Click on **OK**.



6. A warning message displays at the top of the screen and the Comments Step displays with an .



7. Add a comment to indicate you are going to amend the offer.

8. If required, you can also add an attachment. To add a file:

    a. Click on the **Add Attachment** button

    b. Click on the **Browse** button.

    c. Navigate to where the file you wish to attach is stored.

    d. Select the file and click ‘Open’. The file name will appear in the ‘Local File (required):’ field.

e. Enter a title for the attachment in the Title field.

f. Click on the **Upload Attachment** button.

g. Click on the **Abandon Upload** button if you have chosen the wrong item to attach. Select the correct item and then repeat steps.

h. If you wish to add more than one attachment, repeat the upload process.

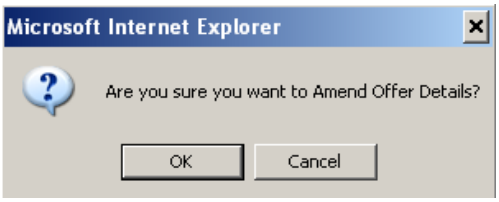
9. Scroll down and click on the

button to save the changes and display the **Amend Offer Details** button.

Step 4: Amend Offer details

10. Click on the **Amend Offer Details** button.

11. You will be prompted to confirm this. Click **OK**.



12. All contractual fields will not be viewed in edit mode. Amend the details as required.

Note: For more information on this process refer to the 'Set up a New Project' section.

13. Click on the **Save**, **Next Step** or **Previous Step** button to save changes made.

14. Once you are happy all changes have been made, click on the Comments Sheet link in the Steps navigation pane and add a comment.

Note: The comment entered in the Comment box should make clear to subsequent users in the workflow what changes have been made, and where they can be viewed.

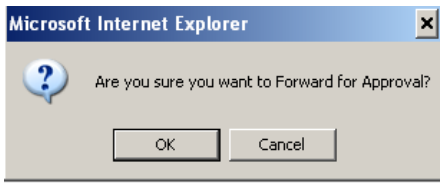
15. Click on the **Next Step** button.

16. The following buttons display:

Button	Description
Forward for Approval	Submits the revised offer to the Grant Approver.
Save and Complete	If the project has had a non-contractual change made to it, such as changing the quarterly funding profile, this button will display. Click to save the changes and make the project live again.
Rollback to current offer	Removes the new project version which was created when the project was put under amendment. It returns the project to the current version and makes it live.
Send offer to applicant under amendment	Sends the offer to the applicant so that the applicant can make amendments.
Save	Saves the changes made so far, and continues to display the offer/project details on the screen.

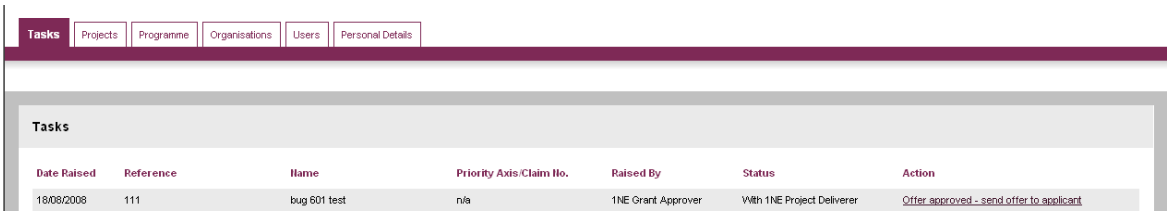
17. Click on the **Forward for Approval** button to send the offer to the Grant Approver.

18. You are prompted to confirm this action. Click on OK.



Step 5: Issue the revised offer

Once the Grant Approver has approved the offer a notification will display in your Task list with a Required Action of: 'Offer Approved – send letter to applicant'.



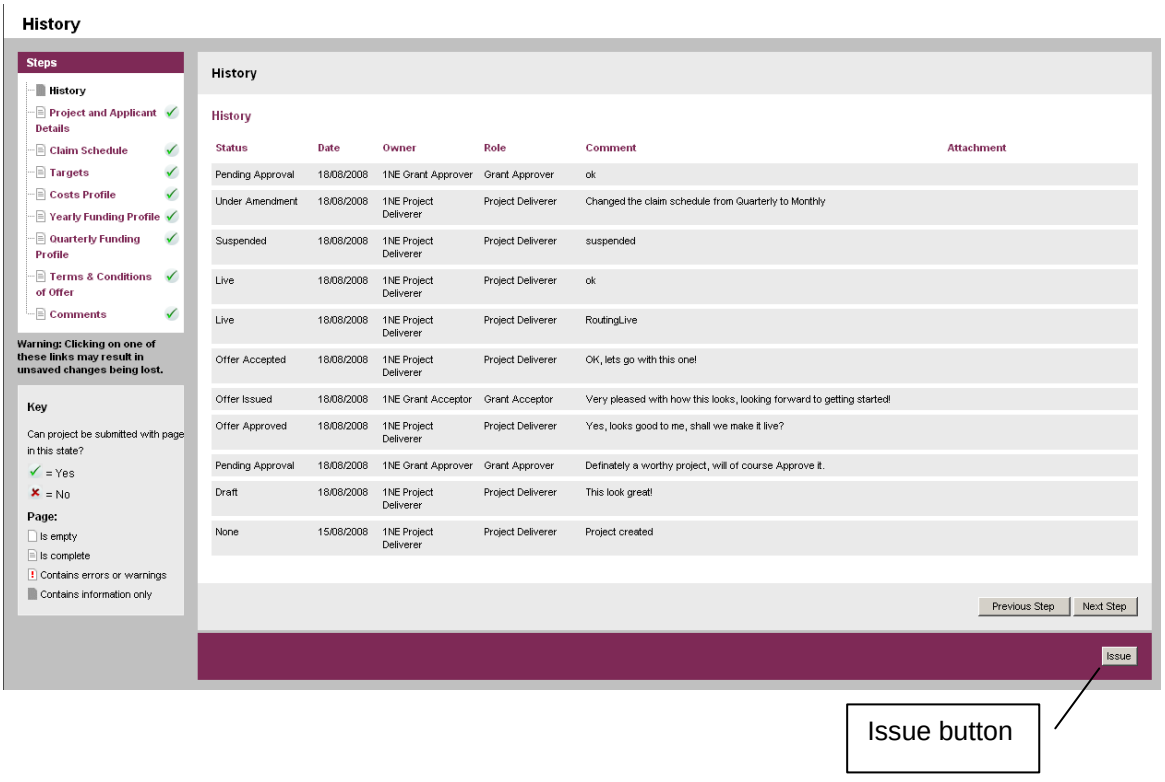
19. Click on the link. The offer History sheet displays.

20. Add your comment for the Grant Acceptor.

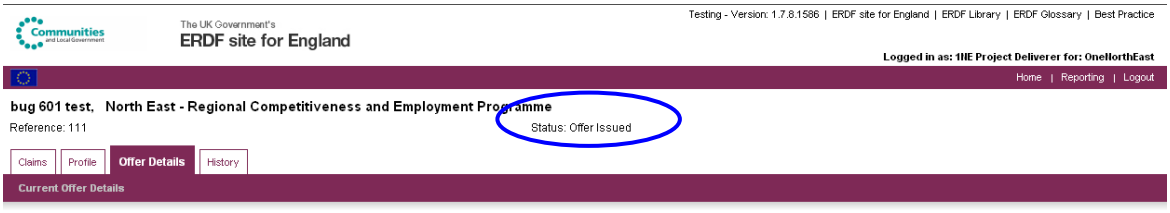
21. An attachment may also be added, if required.

Note: How to add an attachment is covered on page 66

22. Click on the Next Step button to save your comment and display the **Issue** button.

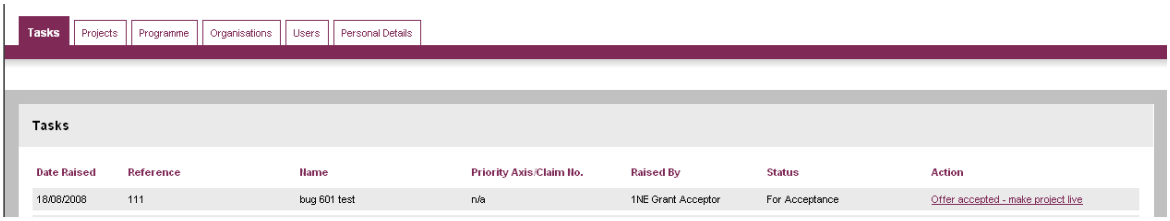

History
Steps
History
Project and Applicant Details
Claim Schedule
Targets
Costs Profile
Yearly Funding Profile
Quarterly Funding Profile
Terms & Conditions of Offer
Comments
Warning: Clicking on one of these links may result in unsaved changes being lost.
Key
Can project be submitted with page in this state?
= Yes
= No
Page:
Is empty
Is complete
Contains errors or warnings
Contains information only
History
History
Status
Date
Owner
Role
Comment
Attachment
Pending Approval 18/08/2008 1NE Grant Approver Grant Approver ok
Under Amendment 18/08/2008 1NE Project Deliverer Project Deliverer Changed the claim schedule from Quarterly to Monthly
Suspended 18/08/2008 1NE Project Deliverer Project Deliverer suspended
Live 18/08/2008 1NE Project Deliverer Project Deliverer ok
Live 18/08/2008 1NE Project Deliverer Project Deliverer RoutingLive
Offer Accepted 18/08/2008 1NE Project Deliverer Project Deliverer OK, lets go with this one!
Offer Issued 18/08/2008 1NE Grant Acceptor Grant Acceptor Very pleased with how this looks, looking forward to getting started!
Offer Approved 18/08/2008 1NE Project Deliverer Project Deliverer Yes, looks good to me, shall we make it live?
Pending Approval 18/08/2008 1NE Grant Approver Grant Approver Definately a worthy project, will of course Approve it.
Draft 18/08/2008 1NE Project Deliverer Project Deliverer This look great!
None 15/08/2008 1NE Project Deliverer Project Deliverer Project created
Previous Step
Next Step
Issue
Issue button

23. Click on the **Issue** button.


Testing - Version: 1.7.8.1586 | ERDF site for England | ERDF Library | ERDF Glossary | Best Practice
The UK Government's
ERDF site for England
Logged in as: 1NE Project Deliverer for: OneNorthEast
Home | Reporting | Logout
bug 601 test, North East - Regional Competitiveness and Employment Programme
Reference: 111
Status: Offer Issued
Claims
Profile
Offer Details
History
Current Offer Details

24. The Status of the project is Offer Issued.

Note: Once the applicant has accepted the reissued offer, the offer will display in the Task List, with a Status of Offer accepted – make offer live.



Step 6: Make the revised project live

Note: See the section on Make a Project Live, on page 62.

View Project History

Each time a significant change is made to a project which requires the re-issue of the offer; MCIS creates a new version and retains previous iterations for audit purposes. This Project History is visible to Intermediate Body and Applicant users.

To display this screen

With the project open, click on the Project History tab.

About this screen

This screen lists all previous versions of the project and offer. To view details of a particular version click on the associated link. The screens will display in read-only view.

Close a Project

It is only possible to close a project that is 'Financially complete'. A project's status on MCIS changes from 'Live' to 'Financially Complete' when the final claim is paid.

1. If necessary, search for and open the project that you wish to close.

2. Click on the Claims tab and scroll down to display the **Close** button.

3. Click on the **Close** button. If you search for the project you will see the project status has changed to Closed.